Cognos® 8

ADMINISTRATION AND SECURITY GUIDE

COGNOS®
THE NEXT LEVEL OF PERFORMANCE™

Product Information

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Introduction

This document is intended for use with Cognos 8. Cognos 8 is a Web product with integrated reporting, analysis, scorecarding, and event management features.

This document contains step-by-step procedures and background information to help you administer Cognos 8.

Audience

To use this guide, you should be familiar with reporting and security concepts, and have experience using a Web browser.

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: For online users of this document, a Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon credentials are available either from your administrator or by request from support.america@cognos.com.

Document	Description
Cognos Connection User Guide	Using Cognos Connection to publish, find, manage, organize, and view Cognos content, such as scorecards, reports, analyses, and agents
Query Studio User Guide	Creating self-service business intelligence reports
Report Studio Professional Authoring User Guide	Authoring reports that analyze corporate data according to specific needs
Report Studio Express Authoring User Guide	Authoring financial reports that analyze corporate data according to specific needs

Document	Description
Event Studio User Guide	Creating and managing agents that monitor data and perform tasks when the data meets predefined thresholds
Framework Manager User Guide	Creating and publishing models using Framework Manager
Cognos PowerPlay Enterprise Server Guide	Administering PowerPlay servers and deploying cubes and reports to PowerPlay users in Windows environments or on the Web
Cognos PowerPlay Web User Guide	Viewing, exploring, formatting, and distributing PowerPlay reports using a Web browser
Cognos Web Portal User Guide	Viewing, finding, organizing, and sharing information in Upfront, the customizable interface used to publish Cognos reports to the Web
Metric Studio User Guide	Authoring scorecard applications and monitoring the metrics within them
Cognos 8 Go! Office User Guide	Using Cognos 8 Go! Office to retrieve content from Cognos reporting products within Microsoft Office
Analysis Studio User Guide	Exploring, analyzing, and comparing dimensional data
Cognos 8 New Features	Describing features that are new in this release
Localization Development Kit Installation and User Guide	Installing and using the Localization Development Kit to translate and customize the messages and user interface text in Cognos products
Map Manager Installation and User Guide	Installing and using Map Manager to import and manage maps that are used in map reports

Document	Description
Cognos 8 Architecture and Deployment Guide	Understanding the Cognos 8 architecture, developing installation strategies, including security considerations, and optimizing performance
Cognos 8 Installation and Configuration Guide	Installing, upgrading, configuring, and testing Cognos 8, changing application servers, and setting up samples
Custom Authentication Provider Developer Guide	Creating a custom authentication provider or a trusted signon provider using the Custom Authentication Provider API
Framework Manager Developer Guide	Creating and publishing models using the Framework Manager API
Cognos Finance User Guide	Creating and managing financial reports and administering the database
Cognos 8 Software Development Kit Getting Started	Using the samples included with the Cognos 8 SDK to learn how to automate Cognos 8
Cognos 8 Migration Tools User Guide	Moving metadata and applications from Cognos Series 7 to Cognos 8
Cognos 8 Planning Installation and Configuration Guide	Installing and Configuring Cognos 8 Planning Products

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Using Quick Tours

Quick tours are short online tutorials that illustrate key features in Cognos product components. To view a quick tour, start Cognos Connection and click the **Quick Tour** link in the lower-right corner of the Welcome page.

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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What's New?

This section contains a list of new and changed features for this release. It also contains a cumulative list of similar information for previous releases. It will help you plan your upgrade and application deployment strategies and the training requirements for your users.

For information about upgrading, see the *Installation and Configuration Guide* for your product.

For information about new features for this release, see the *New Features Guide*.

To review an up-to-date list of environments supported by Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

New Features in Version 8.3

Listed below are new features since the last release. Links to directly-related topics are included.

Improved User Interface for Administrators

Administrative tasks are now located in one central management interface named **Cognos Administration**. The new interface will help you make quicker, more informed decisions, and simplify the overall management of the Cognos environment.

Access to More Documentation

You can access supplementary documentation from **More Documentation** on the **Help** menu of Cognos Connection. This new link opens a dynamic Cognos Documentation page that contains one or more readme files and additional guides, depending on the products you have installed and the language in which you installed them.

More Granular Administrative Capabilities

A more granular approach to securing administrative functions is now available. Administrators can be granted some administrative permissions, but not others. For example, an administrator can have access to tasks associated with managing data sources, but not to the tasks associated with maintaining the security namespaces.

For more information, see "Securing Functions and Features" (p. 199).

Access to System Statistics

You can view metrics related to different servers, dispatchers, and services. The metrics provide you with insight into the status of the environment.

For more information, see "System Performance Metrics" (p. 83).

Snapshot of System Health

You can get a snapshot of the status of all servers, server groups, dispatchers, and services in the Cognos topology. All system metrics are found on the **System** tab in Cognos Administration. When you see statistics in their proper context, you can make better decisions regarding performance, scheduling, and capacity planning.

For more information, see "System Performance Metrics" (p. 83).

Managing Queues

Cognos Administration provides specific views and tools to identify the report, job, or application currently in the queue or being processed. These views also reveal who is running the item, regardless of whether it is a background or interactive task. You can better understand what is happening in your environment and take action to resolve issues. For example, you can cancel a job for a user.

For more information, see (p. 255)

Reducing Deployment Details

An administrator can specify the level of deployment details logged to the content store. By default, the deployment history will contain only summarized information. This will save memory space, improve performance, and require less maintenance. For more information, see "Deploying Selected Public Folders and Directory Content " (p. 281).

You can learn the current status of a deployment by viewing periodic updates in the **Monitor Service**(p. 255).

Setting Priority on Schedules

You can set a priority, from 1 to 5, on a schedule. Setting a priority ensures that if two reports are waiting in the queue to be run, the report with the higher priority is run first. You can override and reset the priority on any schedule.

For more information, see "Manage Entry Run Priority" (p. 262).

Better Control of Interactive Features in Reports

You can now disable interactive features in addition to drill-up, drill-down, and package drill report options. Administrators can control access to all interactive features, including drill-up and drill-down, package drill, authored drill, Go! Search, and notifications.

This feature gives you more control of interactive activities. Hiding these functions may reduce the need for user training in large deployments.

The new capabilities are exposed as run options in Cognos Connection (p. 318).

New Sample Audit Reports

Sample audit reports have been added for metric threshold exceptions, agents, failed reports, and presentation service.

For more information, see "Setting up Logging" (p. 71).

Publishing and Managing Packages in Non-root Folders

You can now publish packages from Framework Manager into any folder in Cognos Connection. In previous versions, packages could be published and maintained only in the single root folder. These packages can also be moved from the root folder to any folder in Cognos Connection. In Framework Manager, any target folder can be used for publishing.

For more information, see "Models and Packages" (p. 217).

Enabling Report Studio Authoring Modes

Report Studio now accommodates two distinct types of report authors:

- **Express**

  This user can access the Report Studio Professional authoring mode and the Express authoring mode.

- **Professional**

  This user can access the Report Studio Express authoring mode for financial report authoring to create and maintain statement style reports. Financial authoring requires many, but not all, of the features that exist in Report Studio and interaction with live data.

In Cognos Administration, you can restrict users to have access to only the Express authoring mode in Report Studio. For more information, see "Set Access to the Report Studio User Interface Profiles " (p. 205).

Server Administration

Server administration is enhanced with new capabilities. You can now:

- set PDF file character encoding, font embedding, and compression types and levels
- set the maximum execution time
- limit hotspots that are generated in an Analysis Studio or Report Studio chart
- set watch list output retention time

Settings for the maximum number of processes and connections has been improved. For some services, you can now set the maximum number of processes and the maximum number of high affinity and low affinity connections that the dispatcher can open to handle requests. For other services, you can set the maximum number of connections.

For more information, see "Server Administration" (p. 99).

Transformer Integrated into Cognos 8

Transformer is now fully integrated into Cognos 8 Business Intelligence. This includes the ability to leverage Cognos 8 metadata, support for cube building on Cognos 8 platforms, and integration with Cognos 8 security.

For more information, see the Transformer *User Guide*.

C8Adm Utility

A new utility is available that can be used to update PowerCubes in a way that best suits your production environment. You can now enable or disable data sources, and stop or start the report and batch services to update PowerCubes. You can also change the data source properties of a PowerCube, which does not require stopping or starting the batch services.

For more information, see the Transformer *User Guide*.

My Activities and Schedules

You can now manage Cognos 8 activities from **My Activities and Schedules** in Cognos Connection.

You can view a list of your activities that are current, past, upcoming on a specific day, or scheduled. You can filter the list so that only the entries that you want appear. A bar chart shows you an overview of activities.

You can set run priority for entries. You can also view the run history for entries, specify how long to keep run histories, and rerun failed entries.

For more information, see "Activities Management" (p. 255)

My Watch Items

Use the **My Watch Items** area of the portal to view and manage alerts for new report versions and rules that you have set for conditional report delivery (p. 234). The **My Watch Items** functionality enables end users to monitor and manage business information that is critical to them from a single location.

As a report owner, you must allow report users to receive alerts and create watch rules for the reports. For information about how to enable these features for reports, see "Enable Watch Rules for a Report" (p. 336).

Report Alerts

By enabling an alert on a report, you can now be notified when a new version is available. Whenever a report is run and saved due to a scheduled or manual run, all subscribers receive an email that a new version is available.

Subscriptions are saved to the **Alerts** tab of **My Watch Items** (p. 234) and can be maintained from that location.

For information about how to subscribe to a report, see "Add Yourself to or Remove Yourself from an Alert List for a Report" (p. 335).

Watch Rules

A new watch rule action is available in Cognos Viewer. You can use watch rules to control when users are notified about the availability of new report versions. When a report is run and saved, a user-defined threshold condition is checked. If this condition satisfies a user's criteria, the report can be e-mailed.

To create a watch rule (p. 337), a saved report must be viewable in HTML format. You can select the data to be monitored and enter the threshold condition that will trigger the delivery of the report. Watch rules are saved to the **Rules** tab of **My Watch Items** (p. 234), and can be maintained from that location.

This feature lets users maintain their own report distribution preferences and avoid information overload.

Drilling Through on Multiple Values

Drilling through is now more powerful and flexible. You can pass multiple items, such as products or countries, to a target report (p. 344). You can now use this feature regardless of the type of drill-through path that was created. Drilling through is automatically enabled when you select multiple values.

In previous versions, passing multiple values was available only within drill-through paths created in Cognos Connection.

Go Directly to Target Report When Only One Target Report Exists

When there is only one target report available, you can now go directly to the target report when you click the drill-through link in Cognos Viewer. If there are multiple target reports available, you see the **Go To** page. This behavior is automatic and works the same way whether the drill-through is defined in Report Studio or in a drill-through definition in Cognos Connection.

For more information, see "Drill Through to Another Target" (p. 343).

Support for Microsoft Excel 2007

Cognos 8 supports Microsoft Excel 2007 native spreadsheets as a report format, in addition to the existing Microsoft Excel HTML formats. The Microsoft Excel 2007 XML format, also known as XLSX, provides a fast way to deliver native Excel spreadsheets to Microsoft Excel XP, Microsoft Excel 2003, and Microsoft Excel 2007.

The use of a native Microsoft Excel format means that the spreadsheets are smaller and more usable. Because the new Office Open XML format is a recognized industry standard supported by ECMA International, the new format provides the added benefit of an open, documented integration format that extends an open systems solution.

The new format appears in the run report user interface. Users of Microsoft Excel XP and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack, which provides file open and save capabilities for the new format.

For more information about Excel format support, see "Excel Formats" (p. 328).

Saving Report Outputs to a File System

You can now export report results directly to a server file system using Cognos Connection. You decide which formats to export, and select from a predefined set of directory locations. This feature makes it easy to integrate Cognos content into other external applications.

Cognos 8 does not keep a record of the exported reports, but does prevent and resolve name conflicts that arise when the same file is saved multiple times to the same directory. You are responsible for managing the reports after export. An XML descriptor file with the same file name prefix is created, which can be used by an external application to locate and manage the exported reports.

The export options appear as run options for a report, provided you were granted access to this feature. For more information, see "Save Report Output" (p. 332).

Resubmitting Failed Jobs and Reports

You can resubmit a failed job or report (p. 266). For example, you discover that 20 reports in a job containing 1,000 reports fail due to an invalid signon. The problem is corrected and the job is resubmitted so that only the 20 failed reports are rerun.

In previous versions, if you submitted a report and it failed, the run options associated with the report were lost. Now the report can be resubmitted without having to reset the run options.

Failed reports, jobs, and agent tasks can be resubmitted from the run history, accessed from the **Past activities** page of **Cognos Administration**, or accessed from the **Actions** page of the item.

Resubmitting Failed Agent Tasks

Failed agent tasks can now be resubmitted with their original data values (p. 266). In previous versions, if a task failed, the data passed to the task was lost. Rerunning the agent may not solve this problem if the task is set to process new events only.

Default Actions for Agent Items

You can now choose a default action to use when an agent item is selected in Cognos Connection, rather than automatically opening the agent in Event Studio (p. 352). The new choices are:

- show the most recent event list
- run the agent
- open the agent in Event Studio

The default action is defined on the **Agent** tab of the item properties in Cognos Connection.

Tabbed Portal Pages

You can now create pages with multiple tabs that are easy to navigate. The new type of pages is also referred to as dashboards. Dashboards are created by using a new portlet named Multi-page. For more information, "Create a Dashboard with Multiple Tabs" (p. 245).

Global Filters and Enhanced Portal Interactivity

You can select the dashboard context in the portal with one or more global filters. A global filter may be a prompt, a drill-up or drill-down action, or a report that is based on drill-through content. For example, you can add a prompt control to a portal page to automatically pass the selection to all reports on the page. When a prompt answer is changed, all related reports will refresh accordingly. So, if you answer a country prompt with Brazil, all related reports on the page will be filtered to show the data for Brazil.

When these techniques are used on a tabbed dashboard, the context is passed to all corresponding sections of the dashboard. This functionality allows for a single selection to drive a number of reports at once.

For more information, see "Adding Interactivity to Pages and Dashboards" (p. 248).

Metric Studio Content in Portal Pages

A Cognos Connection page or a dashboard can now display more types of Metric Studio metrics and a history chart. This new content can be added by using the following new portlets:

- Metric List

  Use to add a watchlist, an accountability list, a scorecard metric list, or a strategy metric list to the page.

- Metric History Chart

  Use add a graphical chart that illustrates the historical performance of a metric to the page.

For more information, see "Pages and Dashboards" (p. 237).

Support for Microsoft SharePoint Portal 2003 and 2007

SharePoint Portal 2003 and 2007 is now supported in Cognos 8. You can use this portal with the Cognos Navigator, Cognos Search, Cognos Viewer, Metric List, Metric History Chart, and Cognos Extended Applications portlets.

For more information, see "Deploying Cognos Portlets to Microsoft SharePoint Portal Server 2003 and 2007" (p. 416).

Changed Features in Version 8.3

Listed below are changes to features since the last release. Links to directly-related topics are included.

Updated Cognos Connection Look

The Cognos Connection user interface was changed to provide more space for reports and information that you care about, and use less space for toolbars and functions. The new features include:

- The **Launch** menu, which replaces the **Tools** menu.

  This menu lets you access the Cognos 8 studios, **Drill-through Definitions**, and **Cognos Administration**.

- The my area icon , which lets you access the **My Watch Items**, **My Preferences**, and **My Activities and Schedules** areas in Cognos Connection.

- The portal style named **Business**.

- The updated **Welcome to Cognos 8** page.

For more information, see "Personalize the Portal" (p. 231).

More Information in the Go To Page

Additional information was added to the **Related Links** page. **Related Links**, also known as the **Go To** page, is used to show users all of the drill-through paths available from a source report. The page now automatically shows more information, such as the target report and its location. This information helps you choose which drill-through path to use.

Cognos Watchlist Portlet

The Cognos Watchlist Portlet was replaced by the Metric List portlet. In the new portlet, the watchlist is now one of the selectable options "Pages and Dashboards" (p. 237).

Replaced Capability

The capability known as **Directory** in previous releases of Cognos 8 was replaced by the following, more granular capabilities:

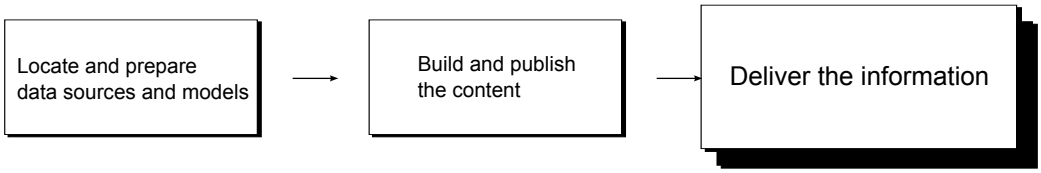
- **Data Source Connections**
- **Set capabilities and manage UI profiles**
- **Users, Groups, and Roles**

For more information, see "Secured Functions and Features" (p. 199).

Building Cognos 8 Applications

The lifetime of a Cognos 8 business intelligence application can be months, or years. During that time, data may change, and new requirements appear, so authors must modify existing content and develop new content, and administrators must update models and data sources as the underlying data changes. For more information about using data sources, see the *Administration and Security Guide* and the Framework Manager *User Guide*.

In a working application, the technical and security infrastructure and the portal are in place, as well as processes for change management, data control, and so on. For information about the workflow associated with creating Cognos 8 content, see the *Architecture and Deployment Guide*. For more information, see the Cognos Solutions Implementation Methodology toolkit, which includes implementation roadmaps and supporting documents. The Cognos SIM toolkit is available on the Cognos Global Services Web site, http://support.cognos.com/en/consulting/csim/index.html.



- locate and prepare data sources and models

  Cognos 8 can report from a wide variety of data sources, both relational and dimensional. Database connections are created in the web administration interface, and are used for modeling, for authoring and for running the application.

  To use data for authoring and viewing, the business intelligence studios need a subset of a model of the metadata (called a package). The metadata may need extensive modeling in Framework Manager.

- build and publish the content

  Reports, scorecards, and so on are created in the business intelligence studios of Cognos 8. Which studio you use depends on the content, lifespan and audience of the report, and whether the data is modeled dimensionally or relationally. Report Studio reports and scorecards are usually prepared for a wider audience, published to Cognos Connection or another portal, and scheduled there for bursting, distribution, and so on. You can also use Report Studio to prepare templates for self-service reporting.

- deliver and view the information

  You deliver content from the Cognos portal or other supported portals, and view information that has been saved to portals, or delivered by other mechanisms. You can also run reports, analyses, scorecards, and so on from within the business intelligence studio in which they were created.

  For information about tuning and performance, see the *Administration and Security Guide* and the Cognos Global Services Web site, http://support.cognos.com.

Chapter 1: Cognos 8 Administration

After Cognos 8 is installed and configured, you can perform server administration, data management, security and content administration, activities management, and portal services administration.

You can also perform the following Cognos 8 administrative tasks:

- automating tasks (p. 40)
- setting up your environment (p. 42) and configuring your database (p. 43) for multilingual reporting
- installing fonts (p. 44)
- setting up printers (p. 45)
- configuring web browsers (p. 46)
- allowing user access to Series 7 reports from Cognos Connection (p. 48)
- restricting access to Cognos 8 (p. 50)

Aside from the typical administrative tasks, you can also customize the appearance (p. 439) and functionality (p. 459) of different Cognos 8 components.

For information about potential problems, see the Troubleshooting section in this guide.

Cognos Administration

In Cognos Connection, you access **Cognos Administration** from the **Launch** menu. You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Administrative Area	Tab	Use
Activities	**Status**	To manage current, past, upcoming, and scheduled Cognos 8 entries.
Content Manager computers	**Status**	To manage Content Manager computers.
Content store	**Configuration**	To perform content store maintenance tasks.
Data sources	**Configuration**	To create and manage data sources connections

Administrative Area	Tab	Use
Deployment	**Configuration**	To deploy Cognos 8, to export from a source environment and then import in a target environment.
Dispatchers and Services	**Status**	To manage dispatchers and services
Distribution lists and contacts	**Configuration**	To create and manage distribution lists and contacts.
Portals	**Configuration**	To manage styles, Cognos portlets, and third-party portlets in Cognos Connection.
Printers	**Configuration**	To create and manage printers.
Security	**Security**	To control access to specific product functions, such as administration and reporting, and features within the functions, such as bursting and user defined SQL.
System, dispatcher, server, and service administration	**Status**	To monitor system performance using system metrics and administer servers.
Server tuning	**Status**	To tune server performance.
Users, groups, and roles	**Security**	To create and manage users, groups, and roles.

Automating Tasks

Virtually everything you can do with the product, you can achieve using the appropriate API, URL interface, or command line utility as illustrated in the table below.

Goal and document	Automation interface	User interface equivalent
To begin basic reporting with the Cognos 8 SDK *Getting Started Guide*	BI Bus API	Cognos Report Studio

Goal and document	Automation interface	User interface equivalent
To modify a model, or republish it to UNIX or Windows Framework Manager *Developer Guide* and Framework Manager *User Guide*	Script Player tool	Framework Manager
To modify an unpublished model The updateMetadata and queryMetadata methods in the Cognos 8 *Developer Guide*	BI Bus API	Framework Manager
To retrieve the query items available in the published package The getMetadata method in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection
To grant capabilities Managing Users in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection, Server Administration
To administer and implement security Authenticating Users and Managing Users in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection, Server Administration
To run, view, and edit reports through a hyperlink in an HTML page Using URLs to View, Edit, and Run Reports in the Cognos 8 *Developer Guide*	URL Interface	Cognos Viewer, Query Studio, and Report Studio
To manipulate objects in the content store Managing Cognos 8 Content in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection, Query Studio, Report Studio, and Framework Manager
To administer reports Managing Reports in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection

Goal and document	Automation interface	User interface equivalent
To administer servers Managing Dispatchers in the Cognos 8 *Developer Guide*	BI Bus API	Cognos Connection, Server Administration
To modify a report Authoring Reports in the Cognos 8 *Developer Guide*	BI Bus API and report specification	Report Studio
To modify the functionality of Cognos 8 Hide User Interface Elements and Restricting Content Browsing in the *Administration and Security Guide*	URL Interface	Cognos Connection, Report Studio, and Query Studio

Setting up a Multilingual Reporting Environment

You can create reports that show data in more than one language and use different regional settings. This means that you can create a single report that can be used by report consumers anywhere in the world.

The samples databases provided with Cognos 8 store a selection of text fields, such as names and descriptions, in more than 25 languages to demonstrate a multilingual reporting environment. For information about how data is stored in the samples databases and how the samples databases are set up to use multilingual data, see the *Administration and Security Guide*.

Here is the process for creating a multilingual reporting environment:

- Use multilingual metadata.

  The data source administrator can store multilingual data in either individual tables, rows, or columns.

  For more information about configuring your database for multilingual reporting, see the *Administration and Security Guide*.

- Create a multilingual model.

  Modelers use Framework Manager to add multilingual metadata to the model from any data source type except OLAP. They add multilingual metadata by defining which languages the model supports, translating text strings in the model for things such as object names and descriptions, and defining which languages are exported in each package. If the data source contains multilingual data, modelers can define queries that retrieve data in the default language for the report user.

  For more information, see the Framework Manager *User Guide*.

- Create multilingual maps.

  Administrators and modelers use a Windows utility named Map Manager to import maps and update labels for maps in Report Studio. For map features such as country and city names, administrators and modelers can define alternative names to provide multilingual versions of text that appears on the map.

  For more information, see the Map Manager *Installation and User Guide*.

- Create a multilingual report.

  The report author uses Report Studio to create a report that can be viewed in different languages. For example, you can specify that text, such as the title, appears in German when the report is opened by a German user. You can also add translations for text objects, and create other language-dependent objects.

  For more information, see the Report Studio Professional Authoring *User Guide*.

- Specify the language in which a report is viewed.

  You can use Cognos Connection to do the following:

  - Define multilingual properties, such as a name, screen tip, and description, for each entry in the portal.
  - Specify the default language to be used when a report is run.

    Tip: You can specify the default language on the run options page, in the report properties, or in your preferences.

  - Specify a language, other than the default, to be used when a report is run.

  For more information, see the Cognos Connection *User Guide*.

The data then appears in the language and with the regional settings specified in

- the user's Web browser options
- the run options
- the Cognos Connection preferences

Any text that users or authors add appears in the language in which they typed it.

Configuring Your Database For Multilingual Reporting

Cognos 8 is a Unicode product capable of querying data in many languages and encoding. Cognos 8 typically queries the database using the native data encoding of the database (Latin-1, Shift-JIS, Unicode, and so on). Cognos 8 translates this data to Unicode as required.

When querying databases with two or more data encodings, Report Studio requests the data in Unicode. Certain databases require specific configuration of the client or server software to enable this capability. For more information, see your database vendor documentation.

Note: For information on round trip safety issues when characters are converted from Unicode to Shift-JIS and back, see the information on the Round Trip Safety Configuration utility in "Round Trip Safety Configuration of Shift-JIS Characters" (p. 619).

Installing Fonts

Cognos 8 uses fonts

- to display HTML reports and pages in browsers
- to render PDF reports on the Cognos 8 server
- to render charts used in PDF and HTML reports

To display output correctly, fonts must be available where the report or chart is rendered. In the case of charts and PDF reports, the fonts must be installed on the Cognos 8 server. For example, if a Report Studio user selects the Arial font for a report, Arial must be installed on the Cognos 8 server to properly render charts and PDF files. If a requested font is not available, Cognos 8 substitutes a different font.

Because HTML reports are rendered on a browser, the required fonts must be installed on the personal computer of each Cognos 8 user who will read the HTML report. If a requested font is not available, the browser substitutes a different font.

When creating reports, you must select fonts that your Cognos 8 server or users have installed. Microsoft delivers a broad selection of fonts with different language packs, so this will likely not be an issue in Windows. However, UNIX servers rarely have fonts installed. You should be prepared to purchase and install the fonts you need on both the server and browser clients.

For information about PDF file settings, see (p. 128). For information on using PDF format in reports, see (p. 326). For information about configuring fonts and about mapping substitute fonts, see the Cognos Configuration *User Guide*.

Cognos 8 Default Font

If a requested font is not found, the Cognos 8 server renders PDF files and charts using a default font. Andale WT, part of the sans serif font family, is the default font because of its wide support of Unicode characters. However, it is not necessarily complete for all languages and may not be considered as attractive as purchased fonts. Also, this font has no Glyph Substitution (GSUB) and Ligature support in most languages.

Report Studio Fonts

Report Studio is an HTML and JavaScript application that runs in a browser. Because of the browser design, Report Studio operates within the browser security sandbox and has no access to the list of fonts installed on the local computer. Instead, Report Studio uses fonts configured in the Cognos 8 global configuration.

For more information, see the Cognos Configuration *User Guide*.

Set Up Printers

To make printers available to users when they distribute reports, you can create entries for printers and save them in the Cognos 8 content store. When users want to print a report, they can select a printer that you set up without needing to know its network address details.

When you create a printer entry, ensure that the printer you define is set up on the computer where Cognos 8 is installed. If the printer is not set up, the users cannot use it.

To set up printers, You must have the required capabilities to access **Cognos Administration** functionality. You must have write permissions for the Cognos namespace. See "Secured Functions and Features" (p. 199).

Printing Considerations

To avoid possible errors, ensure that the following conditions are met before you try printing:

- Ensure that Adobe Reader version 5.0.5 or later is installed on each computer where Cognos 8 servers are installed.
- Ensure that the Cognos 8 server is started using an account that has access to the network printer.

  Sometimes, system accounts may not have access to network printers.
- If Cognos 8 is installed on UNIX, ensure that Adobe Reader is installed in the path of the user that starts Cognos 8.
- If Cognos 8 is installed on UNIX, ensure that the command **lpstat -v**, returns a configured printer and that a printer variable is defined.
- When you define the network address for the printer in Cognos Connection, use the following syntax:

  For Windows, use *\\server_name\printer_name*.

  For UNIX, use *printer_name*.
- When you define the network address for the printer, try using the IP address of the printer instead of the computer name.
- Ensure that Cognos 8 users have the correct access permissions to the printer.

  The role Directory Administrators must have all access permissions granted, and the group Everyone must have read, execute, and traverse permissions granted.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Printers**.

   A list of printers appears.

   Tip: To remove a printer, select the check box for the printer and click the delete button.

3. On the toolbar, click the new printer button .
4. Type a name and, if you want, a description for the printer.

   Tip: Use a name that provides details about the printer, such as Color Printer - 4th Floor
5. Type the network address of the printer by using the format *server_name**printer_name* for a network printer on a Windows installation and *printer_name* for a UNIX installation or for a local printer on Windows.
6. Click **Finish**.

Tip: To check or assign access permissions for a printer, in the **Actions** column, click the set properties button for the printer, and then click the **Permissions** tab.

Configuring Web Browsers

Cognos 8 uses the default browser configurations provided by Microsoft, Netscape, and Firefox. For all browsers, you must ensure that settings are enabled for cookies and Java scripts. Additional required settings are specific to the browser.

The following table shows the settings that must be enabled in the supported Web browsers.

Browser	Setting	Cognos component
Internet Explorer (settings for studios and portals)	Allow Cookies Active Scripting Allow META REFRESH	Cognos Connection Cognos Administration Cognos Viewer Report Studio Query Studio Analysis Studio Event Studio Metric Studio
Internet Explorer (settings for some studios)	Run ActiveX controls and plug-ins Script ActiveX controls marked safe for scripting	Report Studio Query Studio Analysis Studio

Browser	Setting	Cognos component
Internet Explorer (settings for a single studio)	Binary and Script Behaviours Allow programmatic clipboard access	Report Studio
Netscape	Allow Cookies JavaScript	Cognos Connection Cognos Administration Query Studio Event Studio Metric Studio

Note: Report Studio and Query Studio use the native Microsoft Internet Explorer XML support, which is a component of the browser. ActiveX support must be enabled because Microsoft implements XML using ActiveX. Cognos 8 does not provide or download ActiveX controls. Only the ActiveX controls that are installed as part of Internet Explorer are enabled through this configuration.

Cognos 8 uses the following cookies to store user information.

Cookie	Type	Purpose
AS_TICKET	Session temporary	Created if Cognos 8 is configured to use a Cognos Series 7 namespace
caf	Session temporary	Contains security state information
Cam_passport	Session temporary	Stores a reference to a user session stored on the Content Manager server
cc_session	Session temporary	Holds session information that is specific to Cognos Connection

Cookie	Type	Purpose
cc_state	Session temporary	Holds information during edit operations, such as cut, copy, and paste
CRN	Session temporary	Contains the content and product locale information, and is set for all Cognos users
CRN_RS	Persistent	Stores the choice that the user makes for "view members folder" in Report Studio
PAT_CURRENT_FOLDER	Persistent	Stores the current folder path if local file access is used, and is updated after the Open or Save dialog box is used
qs	Persistent	Stores the settings that the user makes for user interface elements such as menus and toolbars
usersessionid	Session temporary	Contains a unique user session identifier, valid for the duration of the browser session.

After upgrading or installing new software, restart the Web browser and advise users to clear their browser cache.

Allow User Access to Series 7 Reports from Cognos Connection

If Cognos 8 is configured properly to use the Cognos Series 7 namespace, you can allow users to access NewsIndexes and NewsBoxes of the Series 7 version of Cognos Upfront from Cognos Connection.

We recommend that Cognos Connection and Upfront use the same Web server if Upfront is set up to use relative URLs. If Cognos Connection and Upfront use different Web servers, configure Series 7 to use fully qualified URL. This allows users to use the Web browser back button to navigate from Upfront back to Cognos Connection.

For information about configuring Series 7, see Cognos Series 7 Configuration Manager *User Guide*. For information about running Series 7 reports, see "Series 7 Reports in Cognos Connection" (p. 345). You may also want to see "Series 7 Users" (p. 185) and "Series 7 Roles" (p. 187).

Steps

1. In Cognos Configuration, configure Cognos 8 to use your Cognos Series 7 namespace. For more information, see the *Installation and Configuration Guide*.
2. In the **Properties** window, under **Cookie Settings**, ensure that the **Secure Flag Enabled** property is set to **false**.
3. From the **File** menu, click **Save** and close Cognos Configuration.
4. Ensure that the ticket server for Cognos Series 7 namespace is running.
5. Ensure that the timeout value of the Series 7 ticket server is set to the same value or to a higher value than the Cognos 8 passport timeout value.
6. On the computer where Cognos 8 is installed, open the *c8_location*/templates/ps/portal/system.xml file in an editor.

   Ensure that your editor supports saving files in UTF-8 format.
7. Find and edit (with an XML editor) the **series7** parameter as follows:

```
<!-- Series 7 Integration parameters -->
<param name="series7">
  <enabled>true</enabled>
  <!-- character encoding used by series7 -->
  <encoding>series7_character_encoding</encoding>
  <!-- host and port to connect to Upfront server -->
  <host>Upfront_host_name</host>
  <port>Upfront_dispatcher_port_number</port>
  <!-- Upfront gateway location -->
  <gateway>Upfront_gateway_location</gateway>
  <!-- If required, specify the prefix for Cognos 8
back URLs when linking to Series 7 content. (eg. http://Cognos8_computer)
otherwise relative URL's will be used -->
  <back-prefix>http://Series 7_server</back-prefix>
</param>
```

   To view the character encoding used by Series 7, in Series 7 Configuration Manager, on the **Properties** tab, click **Cognos Shared**, click **Locale**, and then click the **Encoding** property
8. Save the system.xml file in UTF-8 format.
9. Using Cognos Configuration, stop and then restart Cognos 8.

   For more information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Restricting Access to Cognos 8

You may not want all users that exist in an authentication source to have access to Cognos 8. To secure Cognos 8, configure the product so that only users who belong to a specific group or role in your authentication source, or in the Cognos namespace, are allowed access.

We recommend using the Cognos namespace because it contains preconfigured groups and roles that help you to secure Cognos 8 quickly. One of the preconfigured groups is Everyone. By default, the group Everyone belongs to several built-in groups and roles in the Cognos namespace. If you decide to use the Cognos namespace, you must remove the Everyone group from all built-in groups and roles and replace it with groups, roles, or users authorized to access Cognos 8.

To restrict access to Cognos 8, do the following:

- In Cognos Configuration, enable the required properties to restrict access.

  For more information, see the *Installation and Configuration Guide*.

- In **Cognos Administration**, remove the Everyone group from all built-in groups and roles.

  Replace it with groups, roles, or users that are authorized to access the different functional areas of Cognos 8. For more information, see (p. 207)

- In Cognos Connection, set up access permissions for individual entries, such as folders, packages, reports, pages, and so on (p. 191).

For more information about the security concepts implemented in Cognos 8, see (p. 179).

Chapter 2: Samples

This section explains the purpose, content and location of Cognos 8 samples. It also discusses the sample company, Great Outdoors, its structure, databases, model and packages.

For information on how to set up the sample databases, see "Setting Up the Samples" (p. 56).

Great Outdoors Samples

The Great Outdoors samples illustrate product features and technical and business best practices. You can also use them for experimenting with and sharing report design techniques, and for troubleshooting.

For examples related to different kinds of businesses, see the product blueprints on the Cognos Web site (http://www.cognos.com). For information about specific installation choices and environments, see the *Architecture and Deployment Guide*, or the Proven Practices and the Cognos Implementation Roadmaps on the Cognos Global Customer Services Web site (http://support.cognos.com). For information about audit samples, see the *Administration and Security Guide*.

Where to Find the Samples

The samples are included with the product and the samples for each studio are described in the related user guide and online help. To use the samples, you must set up and configure them, or contact your administrator to find out where they are installed. For instructions on how to set up and configure samples, see the *Installation and Configuration Guide* or the *Administration and Security Guide*.

What Samples Exist

The samples consist of

- two databases that contain all corporate data, the related sample models for query and analysis, and sample cubes, reports, queries, query templates, and dashboards
- a metrics database and the associated metrics, including a strategy map for the consolidated company

  Note: You must have Metric Studio installed to use these samples.
- reports that contain extended tips to explain how and why they were created

  Note: These reports are stored in a folder labeled Practical Examples in the samples folder of the Cognos 8 installation.

Security

You can add security to the samples using an employee list included with the product. The list is in the form of an LDIF file that can be imported into any directory server, such as the Sun Java System Directory Server.

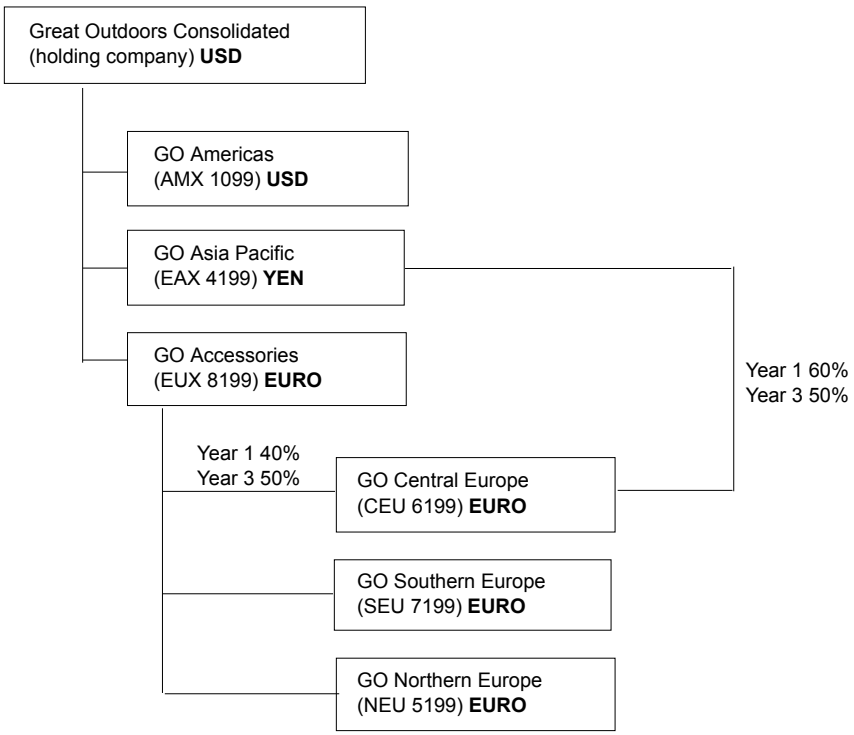
Note: You can download a version of the Sun Java System Directory Server from the Sun Web site (http://www.sun.com/download/). For more information, see the *Installation and Configuration Guide*. For information about conformance, see the Cognos Global Customer Services Web site (http://support.cognos.com).

The Great Outdoors Group of Companies

To make designing examples faster, especially financial examples, some general information about the fictional Great Outdoors company is useful. To look for samples that use particular product features, see the individual sample descriptions in this appendix.

Revenue for The Great Outdoors comes from corporate stores and from franchise operations. The revenues are consolidated from the wholly-owned subsidiaries. The corporate structure is shown below.

The diagram below illustrates the consolidated corporate structure, including the percentage changes in ownership for GO Central Europe, and shows the reporting currency and GL prefix for each subsidiary.



Each corporation has the same departmental structure and the same GL structure, shown in the table below. Divisions may not report in the same currencies. For example, the Americas subsidiary reports in US dollars, but the Corporate division local currency is Canadian dollars, and the Operations division local currency is pesos.

Division (GL)	Department (GL)
Corporate division (1700)	Sales (1720)
	Marketing (1750)
	IS&T (1760)
	Human Resources (1730)
	Finance (1740)
	Procurement (1710)
Operations (1800)	Production and Distribution (1820)
	Customer Service (1820)

Employees

The Great Outdoors data contains a full list of employees in all divisions, departments, and locations. Data is available for reports about bonuses (Global Bonus report) and sales commissions (Sales Commissions for Central Europe report), training (Employee Training by Year report), and performance reviews and employee satisfaction surveys (Employee Satisfaction 2006). If you use Metric Studio, sample metrics for human resources are also available.

In the GO Data Warehouse (analysis) package, groups of measures and the related dimensions are organized into folders. The employees are organized in hierarchies for region, manager, position or department, and organization, to make different kinds of aggregation easy to report on. Aggregation has been set for the Employee Position Summary measures, so that Position count and Planned position count aggregate to a maximum for time dimensions, and a sum for other dimensions. For example, see the Planned Headcount report.

The employees are also listed in a sample LDIF file (p. 52). This authentication directory is necessary for the Transformer 8 cubes and for Cognos Planning samples. No other samples depend on security profiles. For more information, see the *Installation and Configuration Guide*.

Sales and Marketing

Data about sales and marketing is available for all of the companies in the Great Outdoors group. GO Accessories has richer details to support analysis examples. For example, see the Revenue vs % Gross Profit by Product Brand analysis, based on the Sales and Marketing cube. Marketing and sales campaigns are tied to the Great Outdoors regional companies.

Overall, the GO companies have experienced solid growth across most product lines (Sales Growth Year Over Year), in all regions (Revenue by GO Subsidiary 2005), because of factors like an increase in repeat business and new or improved products, such as the high margin sunglasses product line. In the product lines sold by the five regional companies (all but GO Accessories) promotions have had mixed success (Promotion Success by Campaign, Bundle and Quarter). If you use Metric Studio, this can also be seen in the sample metrics.

Customer Surveys

The data also contains information from customer surveys. For example, the product line that includes bug spray, sun screen, and so on has not been successful (Product Satisfaction - Outdoor Protection 2005) and a source of retailer dissatisfaction may be the level of customer service rather than the returns (Customer Returns and Satisfaction). If you use Metric Studio, this information can also be monitored in metrics.

Sales Outlets

Revenue from the corporate outlets is available at the transaction level. Revenue from the franchise outlets is available at the consolidated level only (Sales and Marketing cube). Metrics about retailers show that the number of new retail outlets has dropped over the time period covered by this data.

GO Accessories sells worldwide, and sells only accessories. The other five subsidiaries in the group of companies are regional and sell all product lines for retailers in their region. For example, the report Top 10 Retailers in 2005 uses sparklines and list data to review revenues at the retailer level.

Great Outdoors Database, Models, and Packages

The Great Outdoors models illustrate modeling techniques and support the samples. The models are based on the GO data warehouse and the GO sales transactional database and are the basis for the sample reports and queries. Each model contains two packages for publishing analysis (dimensional) and query views of the data.

For a description of each sample report or query, see the user guide for the studio that you open the sample in. For more information about modeling techniques, see the *Guidelines for Modeling Metadata*, or the Framework Manager *User Guide*.

You must have access to Framework Manager, the modeling tool in Cognos 8, to look at the sample models. You may also need to set up the sample databases and connections. For instructions, see the *Administration and Security Guide* or the *Installation and Configuration Guide*.

GO Data Warehouse

The GO Data Warehouse model, great_outdoors_data_warehouse.cpf, is based on the database GOSALESDW. It contains data about human resources, sales and marketing, and finance, grouped into business areas. In the Database view, the three business areas are grouped into separate namespaces. The Database view contains a fourth namespace (GO Data) for the common information.

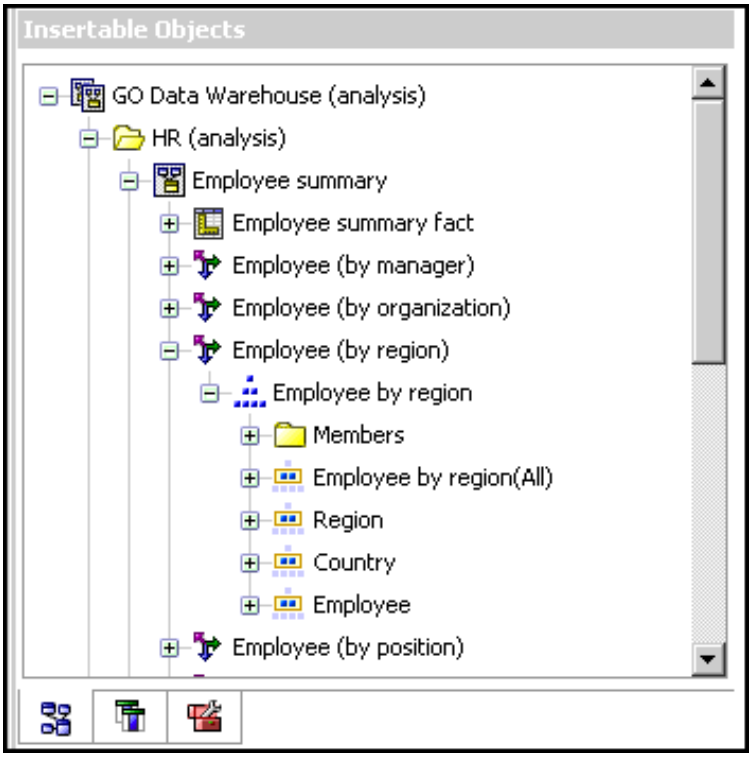
The Database view is very similar to the structure of the underlying database. All tables (database query subjects) are unchanged. This enables Cognos 8 to retrieve metadata directly from the package

in most cases, instead of using a metadata call to the database. The following changes and additions have been made in the Database view:

- Joins have been added as necessary.
- To allow for aggregation at different levels of granularity, some model query subjects have been created. For example, see the relationships between Time and Sales or Sales fact.
- To allow single joins to be made between the lookup tables and each level in a dimension, lookup tables have been copied. For example, see the Products look up tables.

The Business view contains only model query subjects, with no joins. The following changes and additions have been made in the Business view:

- Calculations were added to the model query subjects. For example, the time dimension contains language calculations.
- Where the database has multiple hierarchies, new dimensions have been created to organize each hierarchy. For example, see the employee hierarchies, where employees are organized by manager, organization, region, and position.



The GO Sales Transactional Database

The GO Sales model, great_outdoors_sales.cpf, is based on the GOSALES database, which is structured as a transactional database. It contains principally sales data.

The Database view is very similar to the underlying database structure. The following changes and additions have been made in the Database view:

- To make it possible to join the fact tables to the time dimension, model query subjects and multipart joins have been used.

- Other joins have been added as necessary.

The Business view contains only model query subjects, with no joins. The following changes and additions have been made in the Business view:

- Calculations were added to the model query subjects.
- Model query subjects that were created in the Database view to enable joins on the time dimension have been linked as reference shortcuts.
- Where the database has multiple hierarchies, new dimensions have been created to organize each hierarchy.
- Slowly changing dimensions require calculations to ensure that the correct record for the time period is retrieved. This is done with a calculation such as the one shown below, for the relationship between Sales Staff and Orders.

```
[Business view].[Sales
Staff].[Sales staff code]=[Business view].[Sales].[Sales staff code]
and ([Business view].[Sales].[Day key (order date)] between [Business
view].[Sales Staff].[Day key (record start date)]  and [Business
view].[Sales Staff].[Day key (period record end date)] )
```

Setting Up the Samples

You can use the Cognos samples to learn how to use Cognos 8, including Framework Manager, Metric Studio, Metric Designer, and Event Studio.

Cognos 8 provides sample databases that contain sales, marketing, and financial information for a fictional company named the Great Outdoors Company that sells sporting equipment.

Before you can use the sample databases, Cognos 8 must be installed, configured, and running. For Cognos 8 reports and analyses, Framework Manager should also be installed, configured, and running.

To use the sample content for Metric Designer, the optional modeling tool for Metric Studio, Metric Designer must also be installed, configured, and running.

To set up the samples, do the following:

- ❑ Restore the samples databases.
- ❑ Create the data source connections to the samples databases.
- ❑ If you plan to use OLAP data source samples, set up the sample cubes, if this is required, and create data source connections to the OLAP data sources you want to use.

  Setup tasks are required only for Microsoft Analysis Services cubes and DB2 cubes.
- ❑ If you plan to use the Metric Studio sample, set up the Metric Studio sample.
- ❑ If you plan to use the Metric Designer sample, set up a data source connection to it, set up the Metric Studio sample, and import the Cognos_Samples and GO_Metrics deployment archives.
- ❑ Import the samples content (packages) into the content store.

- If you want to test the sample agent ELM Returns Agent using Event Studio, run the sample agent against changed data.

After you complete these tasks, use Cognos 8 to run the sample reports or scorecards. You can later remove the Cognos 8 samples.

Restore Backup Files for the Samples Databases

To use the samples, you must restore backup files for the samples databases. This action re-creates multilingual versions of the Great Outdoors databases.

The following sample databases and associated files are provided with Cognos 8. For SQL Server and Oracle, each database is delivered as a Microsoft SQL Server backup file and an Oracle export file (.dmp). For DB2, the database schemas are delivered in a DB2 move file. The file are compressed, and you must extract them before you can restore the databases or schemas.

Database or schema description	SQL Server	Oracle	DB2
Great Outdoors sales	GOSALES.zip	GOSALES.dmp.gz	GS_DB.tar.gz
Great Outdoors retailers	GOSALES.zip	GOSALESRT Restore Backup Files .dmp.gz	GS_DB.tar.gz
Great Outdoors sales data warehouse	GOSALESDW. zip	GOSALESDW. dmp. gz	GS_DB.tar.gz
Great Outdoors market research	GOSALES.zip	GOSALESMR. dmp. gz	GO_DB.tar.gz
Great Outdoors human resources	GOSALES.zip	GOSALESHR. dmp. gz	GO_DB.tar.gz

When restoring the samples databases, ensure that you do the following:

- Give the restored databases the same names as the backup or export file names.

  The names are case-sensitive.

- Create a user in your database who has select privileges for all schemas.

  The GO Sales package references tables in all schemas.

- Use the UTF-8 character set.

- Have sufficient disk space available in the target location. Reserve 150MB for the GO Sales data (four schemas) and 200MB for the GO Sales warehouse data (one schema).

Oracle Considerations

To create foreign key constraints in tables that reference different schemas, you must run ora_gosales.sql, found in the same folder as the .dmp files.

SQL Server Considerations

If you restore the SQL Server backup files, you must use Microsoft SQL Server 2000 or Microsoft SQL Server 2005. Ensure that TCP/IP connectivity is used for the SQL server.

DB2 Considerations

Before you restore the Great Outdoors schemas contained in the DB2 move file on UNIX or Windows, extract the DB2 move file. On UNIX, extract the DB2 move file using the *gnutar -xcvf DB2_move_filename* or *tar -xcvf DB2_move_filename* command. If you use WinZip to extract the DB2 move file on Windows, ensure that the TAR file smart CR/LF conversion option is not selected.

After extracting the DB2 move file, restore the schemas to a database named GS_DB. When you create this database in DB2, create a buffer pool with a page size of 16 KB and an associated tablespace.

To restore schemas to the GS_DB database, you must edit the gs_db_modify.sql file and enter a user name and password in the file. You must also run the gs_db_modify.bat file to create additional views and constraints in the GS_DB database.

Steps

1. On the computer where Cognos 8 is installed, go to the sql server, oracle, or db2 directory located in *c8_location* /webcontent/samples/datasources.
2. If required, copy the backup files for the samples databases to your database backup directory.

   To ensure the security and integrity of Cognos 8, copy the files to a directory that is protected from unauthorized or inappropriate access.
3. Restore the samples databases using your database management tool.

   Tip: For SQL backup files, restore the database from a device and ensure that the restore locations are correct for the .ldf and .mdf database files. For more information, see the Microsoft SQL Server documentation or the Cognos Knowledge Base (http://support.cognos.com/kb-app/knowledgebase).
4. For each database, create at least one user who has select permissions for all the tables in the restored databases.

You can now create the data source connections in the portal.

Create Data Source Connections to the Samples Databases

You must create data source connections to the samples databases that you restored. Cognos 8 uses this information to connect to the samples databases and run the sample reports or use the sample package.

The DB2 database name that you type must use uppercase letters. Also, in Framework Manager, the schema names that you type for the DB2 data sources must use uppercase letters.

Before you create the data source connections, you must restore the backup files for the samples databases. Also, ensure that the Cognos 8 service is running.

To create data sources, you must have execute permissions for the Directory secured feature and traverse permissions for the Administration secured function.

Steps

1. Open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Data Source Connections**.
4. Click the new data source button .
5. In the **Name** box, type **great_outdoors_sales** and then click **Next**.
6. In the connection page, click the type of database that you restored and want to connect to, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.

   Tip: The user specified in the great_outdoors_sales data source must have select privileges on the tables in each of the GOSALES, GOSALESRT AND GOSALESHR schemas (p. 57).
7. Do one of the following:
   - If you restored the samples databases in SQL Server, in the **Server Name** box, type the name of the server where the restored databases are located. In the **Database name** box, type **GOSALES**.

     Cognos 8 samples require TCP/IP connectivity with SQL Server. Ensure the SQL Server Security is set to SQL Server and Windows, instead of Windows Only. The samples use SQL Server security for authentication.
   - If you restored the samples databases in Oracle, in the **SQL*Net connect string** box, type the Oracle connection string.
   - If you restored the samples database in DB2, in the **DB2 database name** box, type **GO_DB** using uppercase letters. In the **DB2 connect string** box, type the DB2 connection string.
8. Under **Signons**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, type the user ID and password for the user that you created when you restored the databases, and then click **Finish**.

   Tip: To test whether the parameters are correct, click **Test**.
9. Click **Finish**.
10. Repeat steps 4 to 9 for the GOSALESDW samples database.

For the GOSALESDW database in SQL Server and Oracle, type **great_outdoors_warehouse** for the data source name and **GOSALESDW** for the database name. For DB2, type **great_outdoors_warehouse** for the data source name and **GS_DB** for the database name.

The Great Outdoors data source connections appear as entries in the **Data Sources** tab of the **Directory** tool.

You can now import the samples unless there is a syntax error in the connection string or an incorrect parameter.

Set Up Microsoft Analysis Services Cube Samples

Microsoft Analysis Services (MSAS) cubes are provided which you can use from Cognos Connection or Framework Manager. The cube samples are contained in the GOSALESDW.cab and GOSALESDW.abf archive files in the *c8_location*/webcontent/samples/datasources/cubes/MSAS directory. The archive files must be restored to a Microsoft SQL Server database running Microsoft Analysis Services (p. 57).

The Go Sales Fact cube contains the same monthly sales data as the GOSALESDW database.

The GO Finance Fact cube contains year-to-date and monthly financial data for all accounts so you can create model financial statements in Analysis Studio, Query Studio, and Report Studio. The GO Finance Fact cube contains Actuals in US dollars submissions for 2004, 2005, or 2006.

Note: Both Microsoft XML 6.0 Parser and Microsoft SQL 2005 Analysis Services 9.00 OLEDB Provider must be installed on the local client in order to establish data source connections to MSAS cubes.

Steps

1. On the computer where Cognos 8 is installed, go to the *c8_location*/webcontent/samples/datasources/cubes/MSAS/en directory.
2. Copy the GOSALESDW.cab and GOSALESDW.abf files to a directory that you can access from the Analysis Manager console in the Analysis Servers of Microsoft SQL Server.
3. Use the Analysis Manager to restore the database from the GOSALESDW.cab and GOSALESDW.abf files.

You can now create the data source connections using either the GO Sales Fact or GO Finance Fact cubes (p. 61).

Set Up the DB2 Cube Sample

To set up the DB2 cube sample, you must have Hyperion Essbase installed, and a DB2 OLAP Server with Essbase Integration Services Console.

Steps

1. Using Essbase Integration Services Console, perform an outline member load and a data load.

2. Using the GOSLDW_ML database for the cube, import the GOSLDW_EN_FR_DE_JA_RU_SC.xml model and the GOSLDW_*language*.xml metadata outline for the language that you want to use, where *language* is one of: EN (English), DE (German), FR (French), JA (Japanese), RU (Russian) or SC (Chinese).

   Information about cubes is available in the cube details file for each language: DB2OLAPGOSLDW*language*CubeInfo.xml.

3. Using Hyperion Solutions Essbase Administration- Administration Console, set up the generations for the model and populate the cube.

You can now create a data source connection to the cube (p. 61).

Create Data Source Connections to OLAP Data Sources

Cognos 8 provides the following OLAP samples:

- GO Sales Fact and GO Finance Fact Microsoft Analysis Services cubes
- Great Outdoors Company cube
- Great Outdoors DB2 cube

You must create data source connections to the cubes to use the samples. You must set up the Microsoft Analysis Services cube samples or set up the DB2 cube sample, if you are using them, before creating data source connections.

You can increase the read cache size to improve query performance, although this setting has no effect on the initial time required to open a cube.

To create data sources, you must have execute permissions for the Directory secured feature and traverse permissions for the Administration secured function.

Steps for PowerCubes

1. Open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Data Source Connections**.
4. Click the new data source button.

   Note: You must add a data source connection for each cube.

5. To create a data source connection for the Sales and Marketing cube, type **sales_and_marketing** in the **Name** box, and then click **Next**.

   You can define a Windows path or a UNIX path.

   If you define a UNIX path and you plan to use Framework Manager, you must also define the Windows path and ensure that the cube is also available in the Windows location. Framework Manager can access cubes only from Windows locations.

6. In the connection page, under **Type** click **Cognos PowerCube**, select an isolation level, and then click **Next**.

The connection string page for the selected database appears.

7. In the **Read cache size (MB)** box, type the cache size of the cube in megabytes.

   If you leave this field blank or type 0, Cognos Connection uses the default value in the ppds_cfg.xml file in the configuration folder.

8. In the **Windows location** box, type the location and name of the SalesandMarketing.mdc file for the data source connection. For example, type

   ***c8_location*/webcontent/samples/datasources/cubes/PowerCubes/En/SalesandMarketing.mdc**

9. To test whether the parameters are correct, click **Test**.

10. Click **Finish**.

You can now import the sample package for the PowerCube to use this data source.

Steps for DB2 Cubes

1. Open Framework Manager.

2. Click **Create a new project**.

3. In the **New Project** page, specify a name and location for the project.

4. In the **Select Language** page, click the design language for the project.

5. Click **OK**.

   The Import wizard appears.

6. In the connection page, under **type** click **IBM DB2 OLAP Server**, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.

7. In the **Server name** box, type the name of the server.

8. To test whether the parameters are correct, click **Test**.

9. Click **Finish**.

To use this data source, you must create a package using this data source in Framework Manager, and then publish the package.

Steps for Microsoft Analysis Service Cubes

1. Open Cognos Connection.

2. In the upper-right corner, click **Launch**, **Cognos Administration**.

3. On the **Configuration** tab, click **Data Source Connections**.

4. Click the new data source button.

5. In the **Name** box, type **go_sales_fact** or **go_finance_fact** and then click **Next**.

6. In the connection page, click the type of Microsoft SQL Server database that you restored and want to connect to, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.

7. In the **Server Name** box, type the name of the server where the restored databases are located. If needed, in the **Database name** box, type the name of the database you restored.

8. Under **Signons**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, type the user ID and password for the user that you created when you restored the databases, and then click **Finish**.

   Tip: To test whether the parameters are correct, click **Test**.

9. Click **Finish**.

10. You now have the option to create a package using your new data source. Click **Create a Package** and **OK**, and follow the instructions in the new package wizard.

    Note: You must create a package with this data source in order to use this data source, and you must create a connection between the GOSALESDW_MSAS2005.zip deployment and the MSAS service before you can use the samples.

11. Click **New Connection** and follow the steps in the new connection wizard, naming the connection GOSALESDW_MSAS2005, and selecting the database based on the language you are using. For example, GOSALESDW for English, or GOSALESDW_DE for German.

    When the new connection is created, it appears in the data source connection list.

Set Up the Metric Studio Sample

To set up the Metric Studio sample, do the following:

- Create a metric store named GOMETRICS.

  For more information about creating a metric store, see the Cognos 8 *Installation and Configuration Guide*.

- Create a new metric package named GO Metrics that uses the GOMETRICS metric store.

  For the data source name, type go_metrics. When prompted by the wizard, select the standard Gregorian calendar and accept the defaults for Years, Quarters, and Months. Select January 1, 2004 as the start date for a period of three years.

  For more information, see "Create a Metric Package" (p. 359).

- Set the import source.

- Import the metric data and files into the metric store.

Steps to Set the Import Source

1. Copy all text files from *c8_location*/webcontent/samples/datasources/metricsdata/*GO_Metrics_Unicode* to *c8_location*/deployment/cmm.

Tip: You may need to create the cmm folder.

2. Specify the source and collation code for Unicode in Metric Studio.
3. In Metric Studio, in the **Tools** list, click **Import Sources**.
4. Under **Metric Deployment Location**, click **Use the default deployment location**.
5. Click the **Set Properties** icon in the **Actions** column next to the default import source.
6. Under **Character Set Encoding,** select **Unicode (UTF-16)** and click **OK**.

You can now use the GO Metrics package in Metric Studio.

Steps to Import Metric Data and Files into the Metric Store

1. In Metric Studio, in the **Tools** list, click **Import Sources**.
2. Click **New**.
3. In the **Name** box, type a descriptive name for the data source.
4. Click **Metrics import directory**.
5. Specify the identification code. This identifies the new import source.
6. If the folder includes sub-folders, click **Include sub-folders**.
7. In the **File format** box, click **8.3.1**.
8. In the **Character Set Encoding** box, specify **Unicode UTF16** and click **OK**.
9. Choose whether to import the files into the metric store using Cognos Connection or Metric Studio.
   - To use Cognos Connection, in **Public Folders** or **My Folders**, open the GO Metrics package by clicking the view metric package contents icon in the **Actions** column. Click **Metric Maintenance**.
   - To use Metric Studio, in Metric Studio, in the **Tools** list, click **Metric Maintenance**.
10. Click the **Import and transfer data from files into metric store** metric task.

    Tip: If an error occurs, click **Clear staging area rejected data logs**, **Clear metric history data only**, and **Clear metric history and calendar data**.

You can now use the GO Metrics package in Metric Studio.

Import the Samples

To use the sample package and other content, you must import them from the sample deployment archive.

Before you import the Cognos_Samples.zip and GO_Metrics.zip deployment archives, you must restore the databases (p. 57). For each database, you must create one or more named users with

select permissions for the database tables. You must also create data source connections to the samples databases (p. 58).

Before you import the Cognos_PowerCube.zip or Cognos_PowerCube_Financial.zip deployment archive, you must create a database connection to the appropriate PowerCube and select the language that you want to use. The language that you select must be supported by your locale.

For more information about locales, see the Cognos 8 *Installation and Configuration Guide*.

Steps

1. Copy the zip file from the *c8_location*/webcontent/samples/content directory to the directory where your deployment archives are saved.

   The default location is *c8_location*/deployment. The location is set in the configuration tool. For information about changing the location, see the configuration tool online help.

2. Open Cognos Connection.

3. In the upper-right corner, click **Launch**, **Cognos Administration**.

4. On the **Configuration** tab, click **Content Administration**.

   Note: To access this area in Cognos Administration, you must have the required permissions for the **Administration tasks** secured feature.

5. On the toolbar, click the new import button.

   The **New Import** wizard appears.

6. In the **Deployment Archive** box, select **Cognos_Samples**, **Cognos_Powercubes**, **GO_Metrics**, or **GO_Audit**.

7. Click **Next**.

8. Type a unique name and an optional description and screen tip for the deployment archive, select the folder where you want to save it, and then click **Next**.

9. In the **Public Folders Content** box, select the packages and folders that you want to import.

   The Cognos_Samples deployment archive has the following packages or folders:

   - **GO Data Warehouse (analysis)**, **GO Data Warehouse (query)**, **GO Sales (analysis)**, **GO Sales (query)**, **Sample Template** and **Practical Examples**.

   The Cognos_PowerCube deployment archive for the **Great Outdoors Company** has packages or folders for the following languages:

   - English
   - French
   - German
   - Japanese
   - Russian

- Simplified Chinese

The GO_Metrics deployment archive has the following packages or folders:

- **GO Metrics**

10. Select the options you want, along with your conflict resolution choice for options that you select, and then click **Next**.
11. In the **Specify the general options** page, select whether to include access permissions and references to external namespaces, and who should own the entries after they are imported.
12. Click **Next**.

    The summary information appears.
13. Review the summary information and click **Next**.
14. Select the action that you want:
    - To run once now or later, click **Save and run once**. Click **Finish**, specify the time and date for the run, then click **Run**. Review the run time and click **OK**.
    - To schedule at a recurring time, click **Save and schedule**. Click **Finish**, and then select frequency and start and end dates. Click **OK**.

      Tip: To temporarily disable the schedule, select the **Disable the schedule** check box.
    - To save without scheduling or running, click **Save only** and click **Finish**.
15. When the import is submitted, click **Finish**.

You can now use the sample packages to create reports and analyses in Report Studio, Query Studio, and Analysis Studio, view extracts in Metric Designer, or create agents in Event Studio. You can also run the sample reports that are available on the Public Folders tab in the portal.

Sample Database Models

The following sample models provide information for the fictional company, the Great Outdoors and are provided with Cognos 8:

- go_sales, which refers to the samples database GOSALES
- go_data_warehouse, which refers to the database GOSALESDW
- gosales_scriptplayer, which refers to the samples databases GOSALES

You can use sample database models on different platforms. For information about moving models from one platform to another, see the Framework Manager *User Guide*.

Note: Transformer 8 uses some of the reports in the GO Data warehouse (query) package and GO Sales (query) package as source data for various cubes. These reports are meant to be simple list reports with no formatting. The description information for the reports indicates if the report was developed to be source data for Transformer 8.

GO Sales Model

This model contains sales analysis information for the fictional company, The Great Outdoors. It also has the query items required by the Event Studio samples. The model accesses three schemas and has two packages. One package is based on the dimensional view and the other is baed on the query (relational) view.

GO Data Warehouse Model

This model contains financial, human resources, and sales and marketing information for the fictional company, The Great Outdoors. The model accesses a dimensional relational data source. The model has two packages. One package is based on the dimensional view, the other is based on the query (relational) view.

GO Sales Scriptplayer

These files can be used to run the action logs in sequence. This action generates a model named gosales_scriptplayer, and publishes a package to the content store.

Example - Running the Sample ELM Returns Agent Against Changed Data

You can change data in the GOSALES database if an Event Studio user wants to test the sample agent ELM Returns Agent. The Event Studio user can then run the sample agent twice and detect a new event. For more information, see the Event Studio *User Guide*.

Running the sample agent against changed data involves the following steps:

- The Event Studio user runs the sample agent against the default data and then asks you to change the data.
- You simulate the occurrence of some initial events and then ask the Event Studio user to run the sample agent a second time.
- The Event Studio user runs the sample agent against the changed data. The Event Studio user informs you when the agent has completed running.
- You simulate the passage of time and the resolution of some events and then ask the Event Studio user to run the sample agent a third time.
- The Event Studio user runs the sample agent for the final time. The Event Studio user informs you when the agent has completed running.
- You modify the data so that the ELM Returns Agent detects no events.

Example - Simulate the Occurrence of Initial Events

Run part of the Event_Studio_ELM_Agent_Modify_GOSALES.sql script to simulate the following data changes:

- change the date to the current date
- change the follow-up code to -1 in four records.

A code of -1 indicates that follow-up is required.

Steps

1. In SQL Query Analyzer, from the **File** menu, click **Open**.
2. Go to *c8_location*/webcontent/samples/datasources/sqlserver and double-click the Event_Studio_ELM_Agent_Modify_GOSALES.sql file.
3. In the toolbar, from the list of databases, click **GOSALES**.
4. In the **Query** window, under **Part 1**, select all sixteen lines of code.
5. From the **Query** menu, click **Execute**.

The database is updated with the changes.

Example - Simulate the Passage of Time and the Resolution of Some Events

Run part of the Event_Studio_ELM_Agent_Modify_GOSALES.sql script to simulate data changes. First, change it so that two days elapsed since the **ELM Returns Agent** sample was last run. Second, for three of the four event instances found the last time that the **ELM Returns Agent** sample ran, change the follow-up code from -1 to +1. This indicates that only one of the these event instances still requires follow-up and the other instances are resolved.

Steps

1. In SQL Query Analyzer, from the **File** menu, click **Open**.
2. Go to *c8_location*/webcontent/samples/datasources/sqlserver and double-click the Event_Studio_ELM_Agent_Modify_GOSALES.sql file.
3. On the toolbar, click **GOSALES** from the list of databases.
4. In the **Query** window, under **Part 2**, select all lines of code that appear after the comments.
5. From the **Query** menu, click **Execute**.

The database is updated with the changes.

Example - Modify the Data So That the ELM Returns Agent Detects No Events

When the Event Studio user finishes running the sample ELM Returns Agent against changed data, they should notify you. You can then modify the GOSALES database so that the agent no longer detects any event instances.

Step

- Run the following sql commands:

  UPDATE GOSALES.RETURNED_ITEM SET FOLLOW_UP_CODE = 0

  UPDATE GOSALES.RETURNED_ITEM SET ASSIGNED_TO = 0

  UPDATE GOSALES.RETURNED_ITEM SET DATE_ADVISED = NULL

The data is modified. The sample ELM Returns Agent is ready to be used by another Event Studio User.

Remove the Samples Databases from Cognos 8

You can delete the packages on which the samples are based after you finish using the sample reports to learn about Cognos 8, including Framework Manager. This action permanently removes the samples from the content store.

Steps

1. Open Cognos Connection.
2. Click the **Public Folders** tab.
3. Select the check box for the sample package you want to delete.
4. Click the delete button on the toolbar, and click **OK**.

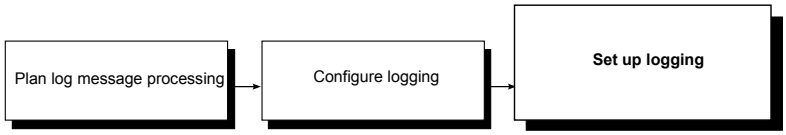
   To use the samples again, you must set up the samples.

Chapter 3: Setting up Logging

Log messages are an important diagnostic tool for investigating the behavior of Cognos 8. In addition to error messages, log messages provide information about the status of components and a high-level view of important events. For example, log messages can provide information about attempts to start and stop services, completion of processing requests, and indicators for fatal errors. Audit logs, which are available from a logging database, provide information about user and report activity.

The Cognos 8 services on each computer send information about errors and events to a local log server. A local log server is installed in the *c8_location*/logs folder on every Cognos 8 computer that contains Content Manager or Application Tier Components. Because the log server uses a different port from the other Cognos 8 components, it continues to process events even if other services on the local computer, such as the dispatcher, are disabled.

The following workflow shows the tasks that are required to prepare for logging.



- During planning, determine the logging configuration that is suitable for your environment. For example, evaluate various log message destinations, such as remote log servers and log files, such as the UNIX or Linux syslog or the Windows NT Event log, in addition to the local log file. You can also send only audit logging information to a third-party database. Consider security, such as methods available for protecting log files from system failures and user tampering. For information about planning, see the *Architecture and Deployment Guide*.
- During configuration, define the startup properties for logging, such as connection settings for third-party databases. You must also create a logging database if you plan to collect audit logs. If communication between a local log server and a remote log server must be secured, make the appropriate configuration changes on both Cognos 8 computers. For information about configuring logging, see the *Installation and Configuration Guide*.
- When setting up logging, specify the level of detail to log to focus messages on the information that is relevant in your organization. Audit reports may also be set up to track user and report activity. For information about setting up logging, see the *Administration and Security Guide*.

For information about using log messages to solve problems and resolving logging-related issues, see the Troubleshooting section of the *Administration and Security Guide*.

You can perform the following tasks to set up logging:

- set logging levels (p. 74)
- set up audit reporting (p. 74)

- view full details for secure error messages (p. 80)
- disable the creation of core dump files (p. 81)

Log Messages

You specify the location of the log messages and the size and number of log files, and configure the properties of the log server in the configuration tool. By default, log messages are saved to the cogserver.log file located in *c8_location*/logs. They can also be saved in a database. For more information, see the *Installation and Configuration Guide*.

For more information about the log service, see "Dispatchers and Services" (p. 99).

Logging Levels

You set logging levels to specify the events and messages to record in the log file or in the log database. An event is an occurrence in your Cognos 8 environment that is significant enough to be tracked, such as starting or stopping a service.

You can set a different logging level for each dispatcher service. You can do this for each dispatcher or for all dispatchers in the same folder. By setting different logging levels for different services you can reduce the amount of irrelevant logging information. For example, if you must troubleshoot the batch report service, you can select a detailed logging level for just that service, keeping log messages to a minimum. The logging level for a service applies to all its components.

Note: The log service does not have logging levels associated with it.

The following table indicates the details that each logging level logs.

Details	Minimal	Basic	Request	Trace	Full
System and service startup and shutdown, runtime errors	✔	✔	✔	✔	✔
User account management and runtime usage of Cognos 8		✔	✔	✔	✔
Use requests		✔	✔	✔	✔
Service requests and responses			✔		✔
All requests to all components with their parameter values				✔	✔

Details	Minimal	Basic	Request	Trace	Full
Third-party queries to Cognos 8 components (native query)				✔	✔

You can maintain system performance by managing the amount of logging performed by the server. Since extensive logging affects server performance, increasing the logging level may negatively affect the performance of Cognos 8.

The default logging level is Minimal. Use Full logging level only for detailed troubleshooting purposes because it may significantly degrade server performance.

Report Validation Levels and Logging Levels

You can collect information about report validation levels by setting the corresponding logging level. Report validation messages can be included in system log messages.

You can use the validation information in different ways. If the system is delivering a generally poor response, you can set logging to a higher level. The additional information can help you determine which reports are at fault and why. If you see warning messages in the logs, this may mean that users are receiving questionable results. You can alert the owners of the offending reports.

There are four report validation levels and five logging levels. The following table shows the correspondence between them.

Report validation level	Logging level
Error	Minimal, Basic
Warning	Request
Key Transformation	Trace
Information	Full

The higher you set the logging level, the more it degrades system performance. Normally, you set the level to Minimal or Basic to collect errors, or to Request to collect errors and warnings.

For information about reports and report validation, see the Report Studio Professional Authoring *User Guide*.

Native Query Logging

If you want to create audit reports (p. 74) that include the queries that are run against your reporting data source, you must enable native query logging. You can use native query logging to learn what kinds of information users want or whether a report is running efficiently.

Native query logging is part of Request level logging. However, if you are using audit reports, you can enable native query logging independently from Request level logging, as described in the following steps.

For information on setting logging levels for audit reports, see "Audit Reports" (p. 74).

Set Logging Levels

You set logging levels to specify the events and messages to record in the log file or in the log database. An event is an occurrence in your Cognos 8 environment that is significant enough to be tracked, such as starting or stopping a service. For more information, see "Logging Levels" (p. 72).

Logging levels that you set for the system apply to all dispatchers and services. Logging levels that you set at the dispatcher level apply to all services that are associated with the dispatcher. Logging levels that you set for individual services apply to the service across all dispatchers.

Logging levels that are set for dispatchers override logging levels that are set for the system level. Logging levels that are set for services override logging levels that are set for dispatchers or the system.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper left corner of the **Scorecard** pane, click the arrow to view the Change view menu, and then click **All servers**, **All server groups**, **All dispatchers**, or **Services**, depending on where you want to set logging levels.
5. Click the arrow next to the item to view the Actions menu, and then click **Set properties**. For example, to set logging levels for the system, click the arrow next to the Actions menu.
6. Click the **Settings** tab.
7. From the **Category** menu, click **Logging**.
8. From the **Value** menu, select the logging level you want for the service.
9. If native query logging (p. 73) is available for the service and you want to use it, select the audit the native query check box.
10. Click **OK**.

Audit Reports

You use audit reports to view the information in a logging database about user and report activity.

The information in this section is intended to help you model the audit logging database in FrameWork Manager and create reports based on your logging data. First, you must set up audit reporting (p. 75).

You may want to refer to the sample model and sample audit reports (p. 75) to help you create audit reports. For information on the database schema for audit reports, see "Data Schema for Log Messages" (p. 683).

Setting Up Audit Reporting

Before you can create audit reports or use the sample audit reports that come with Cognos 8, you must set up audit reporting.

Steps

- Direct log messages to a database.

  Set up a logging database and configure log messages to be sent to the database. For information about configuring log messages, see the *Installation and Configuration Guide*.

  Important: The logging database must be separate from the Content Store database.

- Set the logging level for audit reports.

  Set the logging level to Basic or higher. Do not set the logging level to Full, which will log too much information. For more information, see "Set Logging Levels" (p. 74).

- Enable native query logging (p. 73).

Sample Audit Model and Audit Reports

Cognos 8 includes a sample model and sample audit reports that you can use.

Sample Audit Model

Cognos 8 includes a sample audit model in Framework Manager. The default location is *c8_location*/webcontent/samples/Models/Audit/Audit.cpf.

Sample Audit Reports

The following table lists the sample audit reports and describes the content of each report.

Before you can use them, you must set up the sample audit reports (p. 79).

Audit report name	Description
Agent execution history by user	Lists agent execution history by user and date and time range and includes a bar chart. It also includes the total number of times each agent was executed and the total number of agents that were executed. You can select a date and time range.

Audit report name	Description
Daily average and poor exceptions - all services	Shows how to monitor daily average and poor exceptions of thresholds set in **Cognos Administration** for all services using an agent. An email with attached report output is sent to the administrator when average and poor exceptions occur. To run this report properly, you must first set thresholds in **Cognos Administration** (see "System Performance Metrics" (p. 83)). To receive an email, you must specify a mail server account. For more information, see the Cognos 8 *Installation and Configuration Guide* For more information on setting thresholds in **Cognos Administration**, see "System Performance Metrics" (p. 83).
Daily metric exceptions	Lists daily metric exceptions for all services.
Execute reports by package and report	Lists the reports that were run, by package. It also includes the user, timestamp, and execution time in milliseconds for each report. You can select a date and time range, one or more users, one or more packages, and one or more reports.
Execute reports by user	Lists the reports that were run, by user and by package. It also includes the timestamp and execution time in milliseconds for each report. You can select a date and time range, one or more users, one or more packages, and one or more reports.
Execution history by user	Lists the reports that were run alphabetically, along with the package and timestamp, by user, since the logging database was created. It includes the total number of reports each user ran and the total number of times each user ran each report. It also includes the total number of reports run by all users. You can select one or more users for the report. After you run the audit report, you can choose to view the statistics for a particular report or for all reports.
Failed report executions - by package	Lists report failure executions by package and includes a pie chart, which also shows the failed percentage of each package.

Audit report name	Description
Failed service requests detect agent - all services	Detects preset thresholds for service request failures that are exceeded. An email is sent to the administrator with service failure metrics information. The report Service requests metrics - day report is run. To run this report properly, you must first set thresholds in **Cognos Administration** (see"System Performance Metrics" (p. 83)). To receive an email, you must specify a mail server account. For more information, see the Cognos 8 *Installation and Configuration Guide*.
Logon operations by time stamp	Shows logon and logoff timestamps and operations, by user. It also includes the total number of logons and the total number of logons for each user. You can select the time period and one or more users for the report.
Logon operations by user name	Shows logon and logoff timestamp by user, along with the type of logoff operation that occurred. It includes the total number of logons and the total number of logons for each user. You can select one or more users for the report.
Operations by selected object and users	Shows the operations that are performed on target objects, by user. It includes the target object path, timestamp, and the status of the operation. You can select one or more objects, operations, or users for the report.
Report execution history (detailed report)	Lists reports alphabetically along with the associated package and the timestamp for each time the report was executed. It also shows the total number of times each report was executed and the total number of reports that were executed. It also includes a color-coded pie chart that gives an overview of how often the reports are used.

Audit report name	Description
Report execution history (summary report)	Lists reports alphabetically along with the timestamp for each time the report was run since the logging database was created.
Report usage	Lists reports by frequency of use. For each report, it lists the user and the number of times it was run by the user since the logging database was created. This report can help you determine if there are any reports that are not being used. If so, you may want to remove them.
Service requests metrics - day report	Shows percentage of successful and failed requests for Cognos services for the current day. Includes a bar chart.
User session - abnormal termination	Shows logon date and time of abnormally terminated user sessions. It also includes a total of session termination for all dates. You can select a date and time range.
User session - details	Shows user session details, including the logon time, logoff time, logoff operation, and session duration. It also includes the total amount of session time for each user and the total amount of session time for all users. You can select a date and time range and one or more users.
User session - logon errors for past 30 days chart	This audit report shows a bar graph of logon failures for the past 30 days.
User session - summary	This audit report shows the average session duration by user. It also shows the total average session duration by user. You can select a date and time range and one or more users.
View reports by package and report	This audit report lists users and timestamps for reports for the package that you select. You can select a date and time range, one or more users, and one or more reports.

Setting Up the Sample Audit Reports

You must set up sample audit reports before you can use them.

Steps

- Set up audit reporting (p. 75) by creating a new data source named url_xml and using the URL as the connection string.
- Create a data source connection to the logging database.

  Follow the procedure in "Add or Modify a Data Source Connection" (p. 162). For the data source name and database name, enter the name of the database that you created when you set up audit reporting. Confirm that the connection is working.
- Import the sample audit reports.

  The file Cognos_Audit.zip is included with your installation and is located at *c8_location*/webcontent/samples/content.

  Copy the file to *c8_location*/deployment, and then follow the procedure to import the samples (p. 64), using the defaults and replacing Cognos_Samples with cognos_audit where appropriate. In the public folders content list, select the check box for **Audit**.

  The audit reports reside in the Public Folders area of Cognos Connection.
- Set up the sample report usage audit report (p. 79).
- Run the sample audit reports.

  Tip: In Cognos Connection, click **Public Folders**, click **Audit**, and click the audit report that you want to run.

  Depending on the audit report that you select, you are prompted for report criteria.

Set Up the Sample Report Usage Audit Report

The report usage audit report lists reports by frequency of use. Before it can be used, it must be set up.

Steps

1. In a text editor, open the web.xml file located at *c8_location*/webapps/p2pd/web-inf, and add the following XML fragment:

```
<servlet>
 <servlet-name>DSServlet</servlet-name>
   <servlet-class>com.cognos.demo.DSServlet</servlet-class>
</servlet>
<servlet-mapping>
 <servlet-name>DSServlet</servlet-name>
 <url-pattern>/cognos/DSServlet.jsp</url-pattern>
</servlet-mapping>
```

   Note that the url-pattern value can be anything you choose.

2. If you do not have the following directory on your system, create it: *c8_location*/webapps/p2pd/web-inf/classes/com/cognos/demo.

3. Copy the file build.bat for Windows or build.sh for UNIX located in *c8_location*/webapps/Audit to *c8_location*/webapps/p2pd/web-inf/classes/com/cognos/demo.

   Edit the build file to ensure the JAVA_HOME definition points to your JDK and ensure the CRN_HOME definition points to your Cognos 8 location.

4. If it is not already there, copy the DSServlet.java file from the *c8_location*/webapps/Audit directory to *c8_location*/webapps/p2pd/web-inf/classes/com/cognos/demo.

5. Do one of the following in the DSServlet.java file:

   - If you are allowing anonymous logon, comment out the following line: `binding.logon(...)`
   - If you are not allowing anonymous logon, make sure that the username, password, and namespace are correct and uncomment the following line: `binding.logon(...)`

6. At a command prompt, run build.bat or build.sh from *c8_location*/webapps/p2pd/web-inf/classes/com/cognos/demo.

7. Restart Cognos 8 and open Cognos Connection.

8. Set the connection string by doing the following:

   - In the upper-right corner, click **Launch**, **Cognos Administration**.
   - On the **Configuration** tab, click **Data Source Connections**.
   - Next to your data source, click **More**.
   - Click **View connections**.
   - Click **Set properties**, and then click the **Connection** tab.
   - Under **Type**, select XML.
   - In the **Connection string** field, enter the connection string. If you used the defaults, the connection string is http://localhost:9300/p2pd/cognos/DSServlet.jsp.
   - Click **OK**.

View Full Details for Secure Error Messages

Some Cognos 8 error messages may contain sensitive information such as server names. By default, the Cognos Application Firewall secure error messages option is enabled. Users are presented with information that indicates only that an error has taken place. For more information, see "Filtering of Error Messages" (p. 183).

If you have the appropriate permissions, you can retrieve full error details, which may contain sensitive information.

You may also want to see log messages (p. 72).

Steps to retrieve the full error details

1. Find the error code ID in the user error message. For example, the error number in the following message is secureErrorID:2004-05-25-15:44:11.296-#9:

   An error has occurred. Please contact your administrator. The complete error has been logged by CAF with SecureErrorID:2004-05-25-15:44:11.296-#9

2. Open the cogserver.log file using a text editor.

   The file is located in *c8_location*/logs.

3. Search for the error code ID to locate the applicable error message.

Disable the Creation of Core Dump Files

Core dump files are created when there is a serious problem, such as an unhandled exception or when a Cognos 8 process terminates abnormally. Since core dump files are big and a new one is created each time the problem recurs, you may want to disable them. You can enable core dump files again if you encounter problems that require it.

If such a problem occurs, you receive the following error message: `Report Server not responding`. See the Troubleshooting section in the *Administration and Security Guide* immediately.

You may also want to delete any existing core dump files from the `\bin` directory of the Cognos 8 server installation, if they are not required for troubleshooting purposes. In a Windows environment, core dump files have a .dmp extension and the file name *processID*.dmp, such as BIBusTKServerMain_seh_3524_3208.dmp. In a UNIX environment, the files are named core. In a Linux environment, the files are named core.*processID*.

In some Cognos 8 hotsite builds, core file creation is automatically enabled. The configuration file that controls this is different for Cognos 8.1 MR1 and later versions of the product. During an upgrade, configuration settings are not overwritten.

Steps to Turn Off Core File Creation for Cognos 8.1 MR1

1. On the server where Cognos 8 is installed, open the rsvpproperties.xml file from the *c8_location*\configuration directory.

2. Change the `Win32StructuredExceptionHandling` property to 0 (zero) so that it reads

   ```
   <property>Win32StructuredExceptionHandling</property>
   <value type="long">0</value>
   ```

3. Save the file.

Steps to Turn Off Core File Creation for Cognos 8.1 MR2 and Later Versions

1. On the server where Cognos 8 is installed, open the cclWin32SEHConfig.xml file from the *c8_location*\configuration directory.

2. In the configuration element, change the value of the environment variable setting to 0 (zero) so that it reads

   ```
   <env_var name="CCL_HWE_ABORT" value="0"/>
   ```

3. Save the file.

Chapter 4: System Performance Metrics

You can monitor system performance using metrics in **Cognos Administration**, which allows you to diagnose and fix problems quickly. For example, you may want to know if there are more than 50 items in a queue or if any item has been waiting in a queue for longer than a specified amount of time.

You must have the required permissions to access **Cognos Administration** functionality. For more information, see "Secured Functions and Features" (p. 199).

You can assess the status of the system as a whole, along with the status of individual servers, dispatchers, and services (p. 92). You can view the attributes for each metric score (p. 93), and set the threshold values that are used to calculate metric scores (p. 94). You can apply the same threshold setting to multiple entries (p. 95). You can also reset metrics (p. 96) and refresh report service connections (p. 96).

You can perform functions such as starting and stopping dispatchers or services (p. 102), unregistering dispatchers (p. 105), and refreshing report service connections (p. 96). You can also use log files to analyze long-range performance and usage (p. 71).

You can create a metric dump file for troubleshooting purposes. For more information, see "Metric Dump File" (p. 497).

How Metric Data is Gathered

Data for metrics is gathered differently depending on the metric change type, time scope, and gathering time associated with the metric. For more information on how these apply to individual metrics, see "System Metrics" (p. 84).

Metric Change Type

The value that is displayed for a metric depends on the change type, as shown in the following table.

Change Type	Description
Counter	The value is a sum that increases with each change. For example, number of requests is a counter change type.
Gauge	The value may increase or decrease over time, depending on events. For example, the number of processes running at any time is a gauge change type.

Metric Time Scope

The interval over which a metric value is gathered differs by metric, as shown in the following table.

Time Scope	Description
Point in time	The value is gathered at a specific point in time, such as when you reset a metric group or restart a service
Since reset	The value is gathered over the interval since the last reset of the metric

Metric Gathering Time

The time at which a metric value is gathered differs by metric, as shown in the following table.

Gathering Time	Description
On change	The value is collected when a change occurs, such as when the number of requests changes
On demand	The value is gathered when you select a new item in the Scorecard pane (p. 91), refresh the metric group (p. 96), or reset a metric group (p. 96)
Unknown	The gathering time is unknown

System Metrics

There are a wide variety of metrics available to help you monitor the performance of your Cognos 8 installation. They are listed in the following table with the type of entry they apply to, a description, and the associated change type, time scope, and gathering time (p. 83).

Some metrics are reset when the service restarts. You can also reset some metrics manually (p. 96).

At the system and server levels, the metrics include all associated dispatchers. At the dispatcher level, metrics include all associated services. For server groups, metrics are for all the dispatchers in the group.

Session Metrics

You can use session metrics to monitor user sessions. This is useful for monitoring system trends such as usage patterns by time of day and day of week. Session metrics are also useful for understanding the context of other metrics. For example, if the number of sessions is extraordinarily high, it could account for the queue length metrics (p. 85) being higher than normal.

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Number of Sessions	System	The number of currently active user sessions	Gauge	Point in time	On demand
Number of sessions high watermark	System	The maximum number of active user sessions since the last reset	Gauge	Since reset	On change
Number of sessions low watermark	System	The minimum number of active user sessions since the last reset	Gauge	Since reset	On change

Queue Metrics

You can use queue metrics to determine if the system is keeping up with demand. For example, if requests spend too long in a queue, you may not have enough resources to meet demand.

There are queue metrics for services that use queues: report service and report data service.

There are also queue metrics at the system level for the following things:

- **Job queue**, which contains metrics related to the internal queue used by all event management services.
- **Task queue**, which contains metrics related to the internal queue used by all monitor services. This queue contains tasks until they are successfully completed.
- **SMTP queue**, which contains metrics related to the internal queue used by all delivery services. This queue contains emails until they are sent.

Some of the metrics available for these queue metric groups must be enabled to be displayed. For more information, see (p. 144).

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Latency	System Server/Server group Service	The average amount of time that requests have spent in the queue (in seconds).	Gauge	Since reset	On change
Number of queue requests	System Server/Server group Service	The number of requests that have passed through the queue	Counter	Since reset	On change

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Queue length	System Server/Server group Service	The number of items currently in the queue	Gauge	Point in time	On demand
Queue length high watermark	System Server/Server group Service	The maximum number of items in the queue since the last reset	Gauge	Since reset	On change
Queue length low watermark	System Server/Server group Service	The minimum number of items in the queue since the last reset	Gauge	Since reset	On change
Time in queue	System Server/Server group Service	The cumulative amount of time that requests have spent in the queue (in days, hours, minutes, and seconds)	Counter	Since reset	On change
Time in queue high watermark	System Server/Server group Service	The maximum length of time that a request waited in the queue (in days, hours, minutes, and seconds)	Gauge	Since reset	On change
Time in queue low watermark	System Server/Server group Service	The minimum length of time that a request waited in the queue (in days, hours, minutes, and seconds)	Gauge	Since reset	On change

JVM Metrics

You can use JVM metrics to monitor the Java Virtual Machine and associated heap size (the amount of memory that is currently in use). For example, if a dispatcher has been running for a long time and heap usage is high, you may want to restart it. The maximum heap size metric tells you if you have allocated a suitable amount of memory to the JVM based on the amount o hardware memory available. The current heap size, in relation to the maximum heap size, lets you know if available memory is being used. If current heap size is close to the maximum heap size, you may want to

adjust tuning settings (p. 121) to reduce the load on a particular JVM. Keep in mind that current heap size may vary widely depending on the current load on the system.

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Current heap size (bytes)	Dispatcher	The current size of the JVM heap (in bytes)	Gauge	Point in time	On demand
Initially requested heap size (bytes)	Dispatcher	The initial amount of memory that the JVM requests from the operating system during startup (in bytes)	Gauge	Point in time	On demand
Maximum heap size (bytes)	Dispatcher	The maximum amount of memory that can be used by the JVM (in bytes)	Gauge	Point in time	On demand
Up time	System Server/Server group Dispatcher	The length of time that the JVM has been running (in days, hours, minutes, and seconds) At the system, server, and server group levels, this is the highest value from all associated dispatchers.	Counter	Point in time	On demand

Request Metrics

You can use request metrics to monitor volume of requests, operational status of services, response times, and processing times. General request metrics include data for all services and are a consolidation of metrics for all dispatchers. Request metrics specific to a service include only data for that service.

At the system, server, and server group levels, the metrics include data from all associated dispatchers. At the dispatcher level, metrics include all associated services.

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Current time	Service	The current date and time used by the service to interpret time values. Used only if the service has no clock synchronization mechanism	Counter	Point in time	On demand

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Last response time	System Server/Server group Dispatcher Service	Processing time for the most recent successful or failed request (in days, hours, minutes, and seconds)	Gauge	Point in time	On change
Number of failed requests	System Server/Server group Dispatcher Service	The number of service requests that failed (a fault was returned)	Counter	Since reset	On change
Number of processed requests	System Server/Server group Dispatcher Service	The number of processed requests	Counter	Since reset	On change
Number of successful requests	System Server/Server group Dispatcher Service	The number of service requests that succeeded (no fault was returned)	Counter	Since reset	On change
Percentage of failed requests	System Server/Server group Dispatcher Service	The percentage of processed requests that failed	Gauge	Since reset	On change
Percentage of successful requests	System Server/Server group Dispatcher Service	The percentage of processed requests that succeeded	Gauge	Since reset	On change

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Response time high watermark	System Server/Server group Dispatcher Service	The maximum length of time taken to process a successful or failed request (in days, hours, minutes, and seconds)	Gauge	Since reset	On change
Response time low watermark	System Server/Server group Dispatcher Service	The minimum length of time taken to process a successful or failed request (in days, hours, minutes, and seconds)	Gauge	Since reset	On change
Seconds per successful request	System Server/Server group Dispatcher Service	The average length of time taken to process a successful request (in seconds)	Gauge	Since reset	On change
Service time	System Server/Server group Dispatcher Service	The time taken to process all requests (in days, hours, minutes, and seconds)	Counter	Since reset	On change
Service time failed requests	System Server/Server group Dispatcher Service	The time taken to process all failed service requests (in days, hours, minutes, and seconds)	Counter	Since reset	On change
Service time successful requests	System Server/Server group Dispatcher Service	The time taken to process all successful service requests (in days, hours, minutes, and seconds)	Counter	Since reset	On change

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Successful requests per minute	System Server/Server group Dispatcher Service	The average number of successful requests processed in one minute	Gauge	Since reset	On change

Process Metrics for Report and Batch Report Service

The report service and batch report service have the unique metrics listed in the following table, which you can use to monitor report service processes.

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Number of processes	System Server/Server group Report service and Batch report service	The number of report service processes currently running	Gauge	Point in time	On demand
Number of processes high watermark	System Server/Server group Report service and Batch report service	For system, server, and server group, the total of all Number of processes high watermark metrics for all associated resources For services, the maximum number of report service processes that ran at any one time since the last reset	Gauge	Since reset	On change

Metric	Entry	Description	Change Type	Time Scope	Gathering Time
Number of processes low watermark	System Server/Server group Report service and Batch report service	For system, server, and server group, the total of all Number of processes low watermark metrics for all associated resources For services, the minimum number of report service processes that ran at any one time since the last reset	Gauge	Since reset	On change

Panes on the Status System Page

The **System** page has three panes, which you use to evaluate system status: **Scorecard**, **Metrics**, and **Settings**.

You can refresh each pane independently.

You can sort some columns by clicking on the title. By default, columns are sorted in ascending order. To sort in ascending order, click once. To sort into descending order, click again. To return to default order, click a third time.

Scorecard Pane

The **Scorecard** pane lists entries: system, servers, server groups, dispatchers, and services. For each, it shows a metric score and operational status so that you can assess system performance (p. 92).

Each metric score is represented by a symbol:

- a green circle for good
- a yellow diamond for average
- a red square for poor

You must set metric thresholds before metric scores appear (p. 94).

If a service is disabled in Cognos Configuration, it is not listed.

The metric score for each entry is based on the performance of individual child entries. The status that is displayed for each entry is the lowest status of the child entries. For example, if all the metrics for a dispatcher are good but one service on that dispatcher has a poor metric, the metric score shown for the dispatcher is poor.

Status is one of the following:

- **Available** if all components are available

- **Partially available** if at least one component is available and at least one component is unavailable or partially unavailable.
- **Unavailable** if all components are unavailable

The Toolbar actions menu lets you perform functions such as starting and stopping dispatchers or services (p. 102), unregistering dispatchers (p. 105), testing dispatchers (p. 111), and refreshing report service connections (p. 96). Each entry also has an Actions menu associated with it, which you access by clicking the arrow next to the entry.

You use the **Scorecard** pane to navigate to the entry that you want to view. You can select the view that you want from the Change view menu in the upper-left corner. You can click on entries to select them and display the next level of entries. For example, click a server to see associated dispatchers or click a dispatcher to see associated services.

Consolidated Summary on Scorecard Pane

You can maximize the **Scorecard** pane to see a consolidated view of information that is displayed in the **Scorecard** pane and important metrics from the **Metrics** pane. It includes the following information:

- For servers and server groups, the following information is displayed: metric score, operational status, up time, service time, number of processed requests and percentage of successful requests.
- For dispatchers, the following information is displayed: metric score, operational status, number of processes, service time, current heap size (bytes), number of processed requests, and percentage of successful requests.
- For services, the information that is displayed depends on the service.

Metrics Pane

The **Metrics** pane shows the metrics for the selected entry. You can expand metric groups to see the individual metric scores and values. You can reset each metric group independently (p. 96)

You can select the metrics that you want to display by clicking a check box at the top of the pane. By default, all are displayed. Metrics with no metric score include ones that you can not set thresholds for and ones that you have not yet set metric thresholds for. For the latter, you must display them by clicking the **No metric score** check box before you can set them.

Settings Pane

The **Settings** pane shows settings associated with the selected entry in view only mode. To change settings, click the set properties button .

For more information on the settings in the **Settings** pane, see "Server Administration" (p. 99).

Assess System Performance

To evaluate how Cognos 8 is performing, you can view metric scores that are based on thresholds that you set. You can also view the operational status of system components.

You must set metric thresholds before metric scores appear (p. 94). If dispatchers and services are not performing as they should, you can tune server performance (p. 121). For more information on logging settings, see "Setting up Logging" (p. 71).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.

   The metric score icon next to **System** shows overall system status. The metric score icon next to each server shows the status of that server. In the **Metrics** pane, individual metrics are listed.
4. In the upper left corner of the **Scorecard** pane, click the arrow to view the Change view menu, and then click the view that you want.

   If you choose **All server groups**, display dispatchers that are not grouped by server by clicking **Default server group**.
5. To view the metrics for a displayed item, click the icon to the left of the entry.
6. To view the children of a displayed entry, click the entry itself.

   Tip: You can refresh individual panes by clicking the refresh button in the pane.
7. To view or change the properties of an entry, click the actions menu button next to the entry, and then click **Set properties**.
8. To see the consolidated view, click the maximize button on the **Scorecard** pane.

   Tip: To return to the previous view, click the restore button.

View Attributes for Metric Scores

You can view the last time a metric was reset and updated. You can also view the current threshold setting for each metric score for which a threshold is set. (p. 94). For metrics that are collected at regular intervals, you can also view the period of time to which the value applies.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper left corner of the **Scorecard** pane, click the arrow to view the Change view menu, and then click the view that you want.
5. In the **Metrics** pane, expand ⊞ the metric group that you want to view.

6. In the **Value** column of the **Metrics** pane, pause your pointer over the value for the metric that you want to view.

   The name of the metric is displayed.

7. To view more information about some metrics, click **More**.

Set Metric Threshold Values

You can set threshold values that are used for some metric scores. Acceptable threshold values depend on your operating environment. When a threshold is crossed, the state of the metric score changes.

For example, you determine that the maximum acceptable queue length is 50 items. You select **Low values are good**. You set the upper value to 50 and the lower value to 40. If the queue remains below 40 items in length, the metric score is green (good). If the queue length goes above 40 items, the metric score is yellow (average). If the queue length goes above 50 items, the metric score is red (poor).

Or for percentage of successful requests, you select **High values are good**. You set the upper value to 98 and the lower value to 95. If the percentage of successful requests goes below 95 percent, the metric score is red (poor). If the percentage of successful requests is between 95 and 98 percent, the metric score is yellow (average). If the percentage of successful requests remains above 98, the metric score is green (good).

Changes to thresholds are effective immediately.

There are no threshold defaults. You must set thresholds for metric scores to display.

If you want to be notified when thresholds are exceeded, you can create an agent (p. 351). Sample agents that monitor the audit database for threshold violations and perform common actions when violations are detected are included in the audit samples package.

You can also apply threshold values to more than one entry at once using a template. See (p. 95). For individual entries, you can choose to use the template setting or to override the template setting.

Log entries (p. 71) occur in the following circumstances:

- when metric thresholds are violated
- when enumerated metrics, such as operational status, change

Logs are not generated when metric values change but remain in the same range.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper left corner of the **Scorecard** pane, click the arrow to view the Change view menu, and then click the view that you want.

5. To change the threshold for a metric, in the **Metrics** pane, click the Edit thresholds button next to the metric.
6. To override template settings that may exist for this type of entry (p. 95), click **Override the thresholds acquired from the template**.
7. Click the performance pattern that you want: **High values are good**, **Middle values are good**, or **Low values are good**.
8. To specify a threshold value, click in the threshold box and enter the threshold number you want.
9. Click the arrow beside the threshold value to specify which range the value itself falls into.

   For example, if your maximum value is 50 and you want values of 50 to fall into the average category rather than the poor category, click the arrow to move the threshold value into the average category.
10. Click **OK.**

Apply the Same Threshold Setting to Multiple Entries Using a Template

If you want to use the same threshold for many entries, it is faster to use a template, which applies the same setting to more than one entry. You can use templates for dispatchers and services. The entry must be the same type. For example, if you set thresholds for a server, you can apply all threshold settings to other servers. If you set thresholds for a service, you can apply all threshold settings to other services of the same type.

For individual entries, you can choose whether thresholds override thresholds template settings(p. 94).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper left corner of the **Scorecard** pane, click the arrow to view the Change view menu, and then click **Templates**.

   The template mode is displayed in the **Scorecard** and **Metrics** panes.
5. In the **Scorecard** pane, click the entry that you want.

   The applicable metric groups appears in the **Metrics** pane. The default is **Server**.
6. To change the template for a metric, in the **Metrics** pane, click the Edit thresholds button next to the metric.

7. To specify a threshold value, click in the threshold box and enter the threshold number you want.
8. Click the arrow beside the threshold value to specify which range the value itself falls into.

   For example, if your maximum value is 50 and you want values of 50 to fall into the average category rather than the poor category, click the arrow to move the threshold value into the average category.
9. Click **OK.**

All entries of this type inherit the thresholds that you set in the template.

Reset Metrics

You can reset a group of metrics at any time. For example, for a server, you can reset the **Queue - Report service** group of metrics. When you reset a group of metrics, all the metrics in the group are reset.

Some metrics can't be reset, for example, JVM metrics that are calculated since the last reset time.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper left corner of the **Scorecard** pane, click the arrow to view the Change view menu, and then click the view that you want.
5. In the **Metrics** pane, click the reset button for the group of metrics that you want to reset.

Refresh Report Service Connections

If a PowerCube has been rebuilt, you can update the connection information without affecting current users. To do this, you must first update the connection information to the rebuilt PowerCube, and then refresh the report servers to use the rebuilt PowerCube for new connections. For more information, (see"Update a PowerCube Connection" (p. 165)).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. With all servers displayed, click the check box for the servers you want, and from the Toolbar actions menu, click **Refresh report service connections**.

Tip: You can also do this from the Actions menu next to **System**, servers, and dispatchers. You can also click the **Configuration** tab, and then click **Dispatchers and Services**, and then click the **Refresh Report Service Connections - Configuration** button.

5. When the **View the results** page appears, ensure that the operation has been successful and then click **Close**.

Chapter 5: Server Administration

You can perform the following server administration tasks that help you manage and maintain your Cognos 8 system and tune performance.

You can perform the following server administration tasks:

- manage dispatchers and services
- manage Content Managers
- maintain the content store
- enable Series 7 PowerPlay reports to open in Report Studio or Analysis Studio
- tune server performance
- enabling concurrent query execution
- set query prioritization
- reduce decimal precision
- save report output to a file location
- enable job, task, and SMTP queue metrics
- disabling session caching

You should be familiar with the Cognos 8 components and with how it is installed and configured. If you installed Cognos 8 servers or components on more than one computer, all functionality can be controlled through system administration. For information about the Cognos 8 environment, see the *Installation and Configuration Guide* and the *Architecture and Deployment Guide*.

For some server administration tasks, you use **Cognos Administration** in Cognos Connection and must have the required permissions to access administration functionality. See "Secured Functions and Features" (p. 199).

Dispatchers and Services

The dispatcher is the entry point for Cognos 8 service requests sent by a Web server gateway or third-party software. The dispatcher handles the routing requests and balances the load of user requests to the various Cognos 8 services.

You can have more than one dispatcher in your Cognos 8 environment. In such distributed installations one dispatcher is configured for every instance of the Content Manager or Application Tier Components that are installed and configured in your environment.

After you install and configure Cognos 8, one dispatcher is available on each computer by default. Each dispatcher has a set of associated services, listed in the following table.

Cognos 8 Services

After you install and configure Cognos 8, one dispatcher is available on each computer by default. Each dispatcher has a set of associated services, listed in the following table.

Service	Purpose
Agent service	Runs agents. If the conditions for an agent are met when the agent runs, the agent service asks the monitor service to run the tasks.
Batch report service	Manages background requests to run reports and provides output on behalf of the monitor service.
Content Manager service	• Performs object manipulation functions in the content store, such as add, query, update, delete, move, and copy • Performs content store management functions, such as import and export
Data movement service	Manages the execution of data movement tasks in Cognos 8. Data movement tasks, such as Builds and JobStreams, are created in Data Manager Designer and published to Cognos 8.
Delivery service	Sends emails to an external SMTP server on behalf of other services, such as the report service, job service, agent service, or data integration service
Event management service	Creates, schedules, and manages event objects that represent reports, jobs, agents, content store maintenance, deployment imports and exports, and metrics
Job service	Runs jobs by signaling the monitor service to run job steps in the background. Steps include reports, other jobs, import, exports, and so on.

Service	Purpose
Log service	Records log messages generated by the dispatcher and other services. The log service can be configured to record log information in a file, a database, a remote log server, Windows Event Viewer, or a UNIX system log. The log information can then be analyzed by customers or by Cognos Customer Support, including: • security events • system and application error information • selected diagnostic information
Metric Studio service	Provides the Metric Studio user interface for monitoring and entering performance information
Migration service	Manages the migration from Cognos Series 7 to Cognos 8.
Monitor service	• Manages the monitoring and execution of tasks that are scheduled, submitted for execution at a later time, or run as a background task • Assigns a target service to handle a scheduled task. For example, the monitor service may ask the batch report service to run a report, the job service to run a job, or the agent service to run an agent. • Creates history objects within the content manager and manages failover and recovery for executing entries
Planning job service	Manages communications with the Planning Job Server subsystem.
Planning web service	Manages communications with Contributor Web and Contributor Add-in for *Excel* users.
Planning administration console service	Manages communication with the Contributor Administration Console.
Planning data service	Manages communications for real-time reporting from Contributor plan data in Cognos 8.

Service	Purpose
Presentation service	• Transforms generic XML responses from another service into output format, such as HTML or PDF • Provides display, navigation, and administration capabilities in Cognos Connection
Report data service	Manages the transfer of report data between Cognos 8 and applications that consume the data, such as Cognos 8 Go! Office and Cognos 8 Go! Mobile.
Report service	Manages interactive requests to run reports and provides output for a user in Cognos Connection or a studio
System service	Defines the Business Intelligence Bus API-compliant service used to obtain application-wide Cognos 8 configuration parameters. It also provides methods that normalize and validate locale strings and map locale strings to locales supported by your application.

You can perform the following maintenance on dispatchers and their associated services:

- start and stop dispatchers and services
- activate a Content Manager service
- remove dispatchers from the environment
- group dispatchers in configuration folders
- move dispatchers
- specify advanced dispatcher routing
- specify gateway mappings
- rename dispatchers
- test dispatchers
- administer failover for multiple dispatchers

Stop and Start Dispatchers and Services

You can stop and start dispatchers and services manually. If a service stops responding, you must stop and restart it.

Each dispatcher and service can be

- started

- stopped immediately and delete all the requests that are running or queued, without completing those requests
- stopped after running and queued requests are processed

You can stop or start all dispatchers and services in the Cognos 8 environment at once.

When you start Cognos 8 using the configuration tool, all dispatchers and services start unless they are disabled in the configuration tool. For more information, see the *Installation and Configuration Guide*.

By default, all services start when you restart the computer on which they are installed.

Stopping a service also stops all its processes. When you stop a dispatcher, all its services are stopped. If the suspended dispatcher has an active Content Manager, all users except administrators are locked out.

After a service is stopped, it has a suspended status "System Performance Metrics" (p. 83).

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Determine the dispatchers or services that you want.

Goal	Action
Start all dispatchers in system	With all servers displayed, in the upper right corner of the **Scorecard** pane, click the arrow to view the Toolbar actions menu, and then click **Start dispatchers**. **Tip:** To apply a toolbar action to only some entries, select check boxes for one or more entries and then click the toolbar action that you want.
Start all dispatchers for a server group	With all server groups displayed, click the arrow to view the Actions menu next to the server group, and then click **Start dispatchers**.
Start all dispatchers for a server	With all servers displayed, click the arrow to view the actions menu next to the server, and then click **Start dispatchers**.
Start a specific dispatcher	With all dispatchers displayed, click the arrow to view the Actions menu next to the dispatcher, and then click **Start**.

5.

Goal	Action
Start a specific service	With all services displayed, click the arrow to view the Actions menu next to the service, and then click **Start**.
Stop all dispatchers in system	With all servers displayed, in the upper right corner of the **Scorecard** pane, click the arrow to view the Toolbar actions menu, and then click **Stop dispatchers immediately** or **Stop dispatchers after running and queue processed**.
Stop all dispatchers for a server group	With all server groups displayed, click the arrow to view the Actions menu next to the server group, and then click **Stop dispatchers immediately** or **Stop dispatchers after running and queue processed**.
Stop all dispatchers for a server	With all servers displayed, click the arrow to view the Actions menu next to the server, and then click **Stop dispatchers immediately** or **Stop dispatchers after running and queue processed**.
Stop a specific dispatcher	With all dispatchers displayed, click the arrow to view the Actions menu next to the dispatcher, and then click **Stop immediately** or **Stop after running and queue processed**.
Stop a specific service	With all services displayed, click the arrow to view the Actions menu next to the service, and then click **Stop immediately** or **Stop after running and queue processed**.

6. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **All servers**, **All server groups**, or **All dispatchers**.

   A dialog box appears and confirms the action.

7. Click **OK**.

Activate a Content Manager Service

One Content Manager service is designated to become active at startup. All other Content Manager services start up in standby mode. Only one Content Manager service can be active at any time.

You can manually activate a Content Manager service that is in standby mode. When you activate a service, any currently active service switches to standby mode.

You can also specify a Content Manager service which is currently standby as the default active service at startup.

You must have the required permissions to access **Cognos Administration**. See "Secured Functions and Features" (p. 199).

Steps to Specify a Default Content Manager Service

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, and then click **Content Manager**.
5. Click the arrow for the Actions menu next to the Content Manager service and click **Set as active by default**.

   Tip: Only Content Manager services that are not already the default have **Set as active by default** displayed in the Actions menu.

Steps to Activate a Content Manager Service

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Under **Services**, click **Content Manager**
5. C lick the arrow to view the Actions menu next to the Content Manager service, and then click **Start**.

Remove Dispatchers from the Environment

You can remove a dispatcher if you no longer need it in the Cognos 8 environment. To remove a dispatcher, you must first uninstall the dispatcher from the computer where it is installed. You must then unregister it to remove it from the content store.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click **System**.
4. Determine the dispatchers that you want to unregister.

5. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **All servers**, **All server groups**, or **All dispatchers**.

Goal	Action
Unregister all dispatchers in system	With all dispatchers displayed, in the upper-right corner of the **Scorecard** pane, click the arrow to view the Toolbar actions menu, and then click **Unregister dispatchers**. **Tip:** To apply a toolbar action to only some entries, select check boxes for one or more entries and then click the toolbar action that you want.
Unregister all dispatchers for a server	With all servers displayed, click the arrow next to a server to view the Actions menu, and then click **Unregister dispatchers**.
Unregister all dispatchers for a server group	With all server groups displayed, click the arrow next to a dispatcher to view the **Actions** menu, and then click **Unregister dispatchers**.
Unregister a specific dispatcher	With all dispatchers displayed, click the arrow next to a dispatcher to view the **Actions** menu, and then click **Unregister**.

A dialog box appears to confirms the action.

6. Click **OK**.

The dispatcher information is removed from the content store. You can now uninstall it. If you do not uninstall the dispatcher, it reregisters itself and restarts the next time that Cognos 8 is restarted. For information about uninstalling, see the *Installation and Configuration Guide*.

Group Dispatchers in Configuration Folders

Configuration folders are useful to organize dispatchers if your installation includes many dispatchers. You can group dispatchers so that you can apply the same configuration settings once to all the dispatchers and services in the folder.

When you add a dispatcher to a configuration folder, it automatically inherits the configuration settings of the folder. However, if you previously changed the default values of that dispatcher or service, the changed values are kept.

When you change the configuration settings of a dispatcher or configuration folder, the services for the dispatcher and any child entries for the folder automatically acquire the new values. However, if you change the values of the services, the changed values are kept.

You can create a new configuration folder at the root of the Configuration area or in an existing configuration folder.

Tips

- To view and edit the configuration properties of the parent of an entry shown in the path on the toolbar, click the set properties button . You can change and apply configuration settings for all the dispatchers and services in the Configuration area when you are in the root of the Configuration area.
- Use the path on the toolbar to explore the different levels of your configuration. The path starts with Configuration and, when the path becomes too long, it wraps.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Dispatchers and Services**.
4. Click the new folder button.
5. Type a name and, if you want, a description, and specify where to save the configuration folder.
6. Click **Finish**.

   You can now add dispatchers to the configuration folder by cutting them from their original location and then pasting them inside the folder. You can also change settings at the configuration folder level.

   Tip: To move a dispatcher to another folder, click **More** next to the dispatcher and then click **Move**.

Specify Advanced Dispatcher Routing

Depending on how your system is set up, you may want to control how reports are distributed among servers. For example, you have different departments that maintain their own servers, or you have specific servers set up for specific data access, such as Windows servers for Microsoft SQL Server databases and Linux servers set up for DB2 access. You can set up Cognos 8 so that report requests are processed by specific servers by applying routing rules.

Affinity settings (p. 125) take precedence over advanced routing settings.

Server Groups

When you define the routing rules, you must select a server group. Server group names are a property of a dispatcher or the configuration folders into which the dispatchers are organized. See (p. 122) to set server group names.

To determine which server groups process certain reports, you must associate keywords with packages and user roles or groups, and then specify how the keywords are distributed among the dispatchers in your environment. The distribution is controlled by routing rules that you create for

the routing keywords. The report request will be processed by a specific server depending on the keywords associated with the package from which the report was created and/or the user or group running the report.

When you create the routing rules, you create conditions that determine the server groups by which the reports are to be processed. For example, you can set up routing rules so that reports from a Finance package made by a user in the Finance group are processed by Finance servers. Alternatively, you can set up routing rules so that reports by any Sales users, regardless of which package was used to create the report, are processed by Sales servers. In the first example, you would specify keywords for both user role or group and package, but in the second you would only specify a keyword for user role or group and leave the package keyword blank. You do not have to specify a keyword for both package and user role or group in your routing rules.

You set up the routing keywords and the routing rules using Cognos Connection.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps to Set Routing Keywords for Packages

1. In Cognos Connection, click the **Public Folders** tab.
2. Click the set properties button for a package.
3. Under **Advanced routing**, click **Set**.

   The **Assign routing sets** page appears.
4. Type a routing keyword for the package in **Type routing sets**, and click **Add**.
5. Repeat step 4 to add other routing keywords that you want to apply to the package. Separate each keyword with a semi-colon, for example, Red;Blue;Green;

   The order in which the routing keywords are added does not matter.
6. Click **OK**.

   The routing keywords are displayed under **Advanced routing**.
7. On the **Set properties page**, click **OK**.

Steps to Set Routing Keywords for User Roles or Groups

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Security** tab, and then click **Users, Groups, and Roles**.
4. Click the namespace to display the roles.
5. Click the set properties button for a role or group.
6. Under **Advanced routing**, click **Set**.

The **Assign routing sets** page appears.

7. Select a routing keyword for the package in **Select routing sets**, or type it in **Type Routing Sets**, and click **Add**. If you are typing, separate each keyword with a semi-colon, for example, Red;Blue;Green;.
8. Repeat step 7 to add other routing keywords that you want to apply to the package.

   The order in which the routing keywords are added does not matter.
9. Click **OK**.

   The routing keywords are displayed under **Advanced routing**.
10. On the **Set properties page**, click **OK**.

Steps to Set Routing Keywords for Server Groups

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Dispatchers and Services**.

   The dispatchers and any configuration folders that have been created are shown.

   Note: You can only apply routing rules to server groups. Server groups are a property of dispatchers or configuration folders, and must be set up before you can set routing keywords for server groups (p. 122).
4. Click the specify routing rules button .

   The **Specify the routing rules** page appears.
5. Click **Add a rule**.
6. Select the **Package routing set**, **Group routing set**, **Role routing set**, and **Server group** that you want.
7. In the **Actions** column, click the View the members button to see an overview of the members.
8. To change the order of routing rules, click Modify the sequence, and then the item you want to move and click **Up**, **Down**, **To top**, or **To bottom**.

   Note: Unlike routing keywords, the order in which the routing rules are listed affects how they are applied. A rule is matched when properties associated with the package and/or the user or group involved in the request satisfy the criteria of the rule. The rules are evaluated in order until the first one is matched, and the request is routed to the server group named by the first rule that was matched. You can change the order of the rules by clicking **Modify the sequence**.
9. Click **OK**.

Specify Gateway Mappings for Series 7 PowerPlay Data

Cognos 8 Go! Office users may send requests to Report data service (RDS) for data that resides on a Series 7 PowerPlay server. Report data service (running on the Cognos 8 application server) communicates with Series 7 PowerPlay through the Series 7 PowerPlay Enterprise Server gateway.

If the network configuration prohibits application server access to the Web tier server that hosts the Series 7 PowerPlay Enterprise Server gateway, then a second internal Series 7 PowerPlay Enterprise Server gateway must be installed in the application server tier. In this type of configuration, you can specify the location of the Series 7 PowerPlay server by using the Gateway Mappings setting in Server Administration.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, and then click **Report data**.
5. Click the arrow next to **reportDataService** to view the Actions menu, and then click **Set properties**.
6. Click the **Settings** tab.
7. In the **Value** column, click **Edit** for Gateway mappings.
8. Click the check box **Override the settings acquired from the parent entry**.
9. Click **Add a mapping**.
10. For **Application gateway (external)**, type the address of the Web server.
11. For **Application gateway (internal)**, type the address of the Series 7 PowerPlay server.
12. Click **OK**.

Rename Dispatchers

As a security measure, you can rename dispatchers if you do not want to reveal the host computer name, port number, servlet, or path of the dispatcher.

Typically, server administrators can view and change the name of dispatchers. For more information, see "Predefined Entries" (p. 208).

We recommend that when renaming a dispatcher, you do not use any information that reveals the host computer name or port, or other system or path information. However, it is important to remember where the dispatcher is installed, for monitoring purposes.

Tip: If you rename a dispatcher and need to access the host, port, and path information, you can use the SDK methods to find this information in the dispatcherPath property of the Dispatcher Object.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **All dispatchers**.
5. Click the arrow next to the dispatcher to view the Actions menu, and then click **Set properties**.
6. In the **Name** box, type the new name for the dispatcher.

   Use a meaningful name to help you distinguish dispatchers. Do not reveal system information in the name.
7. If you want, add a screen tip and description information.
8. Click **OK**.

Test Dispatchers

To evaluate how Cognos 8 is performing, you can test the status of dispatchers. You can also ensure that the dispatchers are responding and view the uptime, which is the time in seconds during which the dispatchers are working without failure.

You can also view the status of dispatchers and service and review log messages.

When you test a dispatcher, you also test the services that belong to that dispatcher.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Determine the dispatchers that you want to test then follow the instructions in this table. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu and then click the items you want to display.

Goal	Action
Test all dispatchers in system	With all servers displayed, in the upper right corner of the **Scorecard** pane, click the arrow to view the Toolbar actions menu, and then click **Test**. **Tip:** To apply a toolbar action to only some entries, select check boxes for one or more entries and then click the toolbar action that you want.
Test all dispatchers for a server group	With all server groups displayed, in the upper right corner of the **Scorecard** pane, click the arrow to view the Toolbar actions menu, and then click **Test dispatchers**.
Test all dispatchers for a server	With all servers displayed, click the arrow next to the server to view the Actions menu, and then click **Test**.
Test a specific dispatcher	With all dispatchers displayed, click the arrow next to the dispatcher to view the Actions menu, and then click **Test**.

A dialog box appears and confirms the action.

5. Click **OK**.

If dispatchers are not performing as they should, you can tune server performance by changing their configuration settings (p. 121).

Administering Failover for Multiple Dispatchers

In a distributed Cognos 8 installation, you may choose to configure each of your gateway components to communicate with more than one dispatcher for failover purposes. The gateway components scan their associated dispatchers to ensure that requests are routed to dispatchers that are in service and responding correctly. You can set the frequency with which these scans are executed.

For information about configuring multiple dispatcher, see the "Configuring Gateway Computers" topic in the *Installation and Configuration Guide*.

Set the Frequency of Dispatcher Status Scans

You can specify how often dispatchers are scanned to determine their current status for failover purposes.

Parameter	Purpose
ConnectionCheckingSleep Time	The interval in seconds between scans for the state of dispatchers. Valid settings are 1 to 2147483647. Settings less than 5 may consume too many resources (CPU time and network bandwidth). Default: 30
ConnectionCheckingQuick SleepTime	The interval in seconds between scans when no operational dispatchers are found. This parameter must be less than ConnectionCheckingSleepTime. Valid settings are 1 to 2147483647. Settings less than 5 may consume too many resources (CPU time and network bandwidth). Default: 5

Steps

1. Copy the *c8_location*/cgi-bin/cognoscgi.conf.sample file to *c8_location*/bin and rename it cognoscgi.conf.
2. Open the cognoscgi.conf file in an editor that can save files in UTF-8 format.
3. Add the following lines to the file:
```
ConnectionCheckingSleepTime=time in seconds
ConnectionCheckingQuickSleepTime=time in seconds
```
4. Save the cognoscgi.conf file in UTF-8 format.

Set the Frequency of Dispatcher Scans for a Servlet Gateway

If you have chosen to use Servlet Gateways, you can specify how often they scan dispatchers for their current status. Traffic is routed to another dispatcher if the first one fails.

For information about gateways and URIs, see the *Installation and Configuration Guide*.

Parameter	Purpose
pingPeriod	The interval in seconds between scans for the state of dispatchers. Valid settings are 1 to 2147483647. Settings less than 5 may consume too many resources (CPU time and network bandwidth). Default: 180

Parameter	Purpose
fileCheckPeriod	The interval in seconds between startup configuration file checks for new dispatchers. Valid settings are 1 to 2147483647. Settings less than 30 seconds are not recommended. The configuration file is unlikely to change that often. Default: 30

Steps

1. Open the Servlet Gateway web.xml file, located either in *c8_location*/war/gateway/ or in the deployment directory of the servlet, depending on which server you are using, in an editor that supports saving files in UTF-8 format.
2. Change the values for the parameters as required.

```
<!-- The number of seconds between pings to dispatcher
-->
   <param-name>pingPeriod</param-name>
   <!-- A non-zero positive integer -->
   <param-value>180</param-value>
  </init-param>
  <init-param>
   <!-- The number of seconds between checking the startup file
for changed dispatchers -->
   <param-name>fileCheckPeriod</param-name>
   <!-- A non-zero positive integer -->
     <param-value>30</param-value>
      </init-param>
```

3. Save the web.xml file in UTF-8 format.

Content Manager Computers

Your installation may include more than one Content Manager, each on a different computer. One Content Manager computer is active and one or more Content Manager computers are on standby. The standby Content Manager computers are for failover protection. If the active Content Manager computer is not available because of a software or hardware failure, a standby Content Manager computer becomes active and requests are directed to it.

When the active Content Manager fails, unsaved session data is lost. When another Content Manager becomes active, users may be prompted to log on.

Ensure that the clocks on each computer where Content Manager is installed are synchronized. If they are not, you may experience odd behavior if a failover occurs. For example, there may be a delay before the status of a newly disabled server is updated in Cognos Administration.

You can set advanced Content Manager parameters (p. 118) for the following:

- database connection pool settings (p. 115)
- sorted entries for non-English locales (p. 116)

- Content Manager synchronization (p. 116)
- control browsing of external namespaces (p. 117)

For more information about Content Manager, see the *Installation and Configuration Guide*.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Managing Database Connection Pool Settings for Content Manager

Content Manager uses database connections to access the content store. You can change connection pool settings for Content Manager to increase performance.

With pooled connections, Content Manager does not have to create and open connections for new requests. This provides faster response times. However, pooled connections reserve database resources, so idle connections should be closed if they are not needed.

You can manage the number of connections to the content store by limiting the maximum number of connections and by specifying how long connections stay in the pool before they are automatically closed.

The following table lists the available parameters.

Parameter	Purpose
CM.DbConnectPoolMax	The maximum number of concurrent database connections that are allowed to the content store. Valid settings are -1, or 5 to 2147483647, or the database setting, whichever is less. This setting applies only to Content Manager connection pool settings. If you have other services that access the same content store, there may be more concurrent database connections than specified in this parameter. Default: -1 (unlimited)
CM.DbConnectPoolTimeout	Maximum time in milliseconds that a thread waits for a connection to be available from the pool. Valid settings are -1 to 2147483627. A setting of 0 specifies that threads never wait for a connection if one is not available immediately. Default: -1 (unlimited)

Parameter	Purpose
CM.DbConnectPoolIdleTime	Minimum time in milliseconds that a connection stays idle in the pool. Only valid if the value of DbConnectPoolCleanUpPeriod setting is positive. Valid settings are -1 to 2147483647. A setting of 0 or -1 specifies that idle connections are closed when Content Manager restarts. Default: 300000 (5 minutes)
CM.DbConnectPoolCleanUp Period	Time in milliseconds between invocations of a cleanup thread that closes idle connections in the pool that exceed the setting of DbConnectPoolIdleTime. Valid settings are -1 to 2147483647. A setting of 0 or -1 specifies no clean up thread. Default: 300000 (5 minutes)

Sorting Entries for Non-English Locales

If you use a locale other than English, entries in Cognos Connection may not be sorted correctly. You can correct this problem for an Oracle or Microsoft SQL content store by using the CM. SortCollation setting.

For example, to sort entries in an Oracle database using a Chinese phonetic collation, set CM. SortCollation parameter to SCHINESE_PINYIN_M.

For information about supported collations, see the Oracle and SQL Server documentation. Setting the CM.SortCollation value has no effect on Content Manager running against DB2 or Sybase databases.

Managing Content Manager Synchronization

If your installation includes standby Content Manager computers, you can set parameters that specify Content Manager standby activities. You can specify how often checks occur to ensure that the active dispatcher has not failed, how long it takes to determine which Content Manager is active when failover occurs and at startup, how often an active Content Manager sends a response when it is busy, and how long a short network interruption can be without causing a failover.

The following table lists the available parameters.

Parameter	Purpose
CM.CMSync_NegotiationTime	Time in milliseconds that it takes to determine the active Content Manager when a failover occurs. Valid settings are 1 to 9223372036854775807. Default: 2000
CM.CMSync_NegotiationTimeForStartUp	Time in milliseconds that it takes to determine the active Content Manager at startup. Valid settings are 1 to 9223372036854775807. Default: 60000
CM.CMSync_CheckActive Time	Time in milliseconds for an active Content Manager to become standby when another Content Manager becomes active. Default: 10000
CM.CMSync_PingTimeout	Time in milliseconds that a busy Content Manager sends a response if it is running. Valid settings are 1 to 9223372036854775807. Default: 120000
CM.CMSync_ShortNetwork InterruptionTime	Time in milliseconds that a short network interruption can occur without causing a failover. Valid settings are 1 to 9223372036854775807. Default: 3000

Control Browsing of External Namespaces

You can control whether users can browse external namespaces.

When the CM.SecurityQueryRequiresRead setting is set to true, the Content Manager prevents browsing of external namespaces when the external namespace policy is updated to deny read permissions to users or groups. This setting controls whether the Content Manager forces a read permission filter for external namespace query results. The default is false.

Set Advanced Content Manager Parameters

You can set advanced Content Manager parameters. For information about parameters, see (p. 114).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, and then click **Content Manager**.
5. Click the arrow next to **ContentManagerService** to display the Actions menu, and then click **Set properties**.
6. Click the **Settings** tab.
7. Click **Edit** next to **Advanced Settings**.
8. Select **Override the settings acquired from the parent entry**.
9. In the **Parameter** column, enter the parameter name.

   For example, enter **CM.DbConnectPoolCleanUpPeriod**.
10. In the **Value** column, enter the associated value for the setting.
11. Continue entering setting names and values as required.
12. Click **OK**.
13. On the **Set properties** page, click **OK**.

Maintain the Content Store

You can find and fix inconsistencies within the content store or between the content store and external namespaces.

You can create content maintenance tasks and run content store maintenance on demand. You can run content maintenance tasks at a scheduled time or based on a trigger, such as a database refresh or an email (p. 274). You can schedule content maintenance tasks as part of a job (p. 271) or as part of an agent (p. 351). You can also view the run history of content maintenance tasks (p. 264).

Content maintenance tasks can check for inconsistencies within the content store due to missing data or obsolete data or between the content store and external namespaces.

Internal Content Store Maintenance

Missing data within the content store may cause updates to fail. Obsolete data may prevent you from creating new objects. When a content store maintenance task fixes the content store, it adds default values for the missing data, which you can update later. It also permanently deletes any

obsolete data. To ensure that you do not lose any data that you wanted to keep, we recommend that you choose the find mode first and check the results before fixing the content store.

When you find and fix the data, the content store is not fixed while the content maintenance task is running. Instead, Content Manager fixes the inconsistencies in the content store the next time it starts up.

Important: After you run a content maintenance task to find and fix the content store, back up your content store before you restart Content Manager.

We recommend that you perform internal maintenance checks regularly, but it is particularly important to do so before you upgrade, to ensure the consistency of the content stores.

Content Store Maintenance on External Namespaces

When you delete users in external namespaces using a third-party authentication provider, user account information remains in the content store. You can use the Cognos Administration to find user information that still exists in the content store and fix the content store by deleting any users that do not exist in your external namespaces. You can also delete individual user profiles from the content stores (p. 309).

If you want to run a content maintenance task on more than one namespace, do one of the following:

- If you want to run the content maintenance task now, simply log on to the namespaces and create the content maintenance task.
- If you want to schedule a content maintenance task to run in the future or on a recurring basis, keep in mind that a scheduled content maintenance task runs against the namespaces that you select when you create the content maintenance task. Before you schedule a content maintenance task, ensure that your credentials contain logon information for each namespace by renewing the credentials after you log on to every namespace that you select to run the content maintenance task against.

  Tip: Click **My Area**, **My Preferences**, click the **Personal** tab, and then click **Renew the credentials**.

You must have logon permission for each selected external namespace and read permission for all user accounts on each external namespace.

If you do not have read permission for a user account on the external namespace, it is assumed that the user was deleted from the namespace. When you run a content maintenance job, the user information on the content store is either listed as inconsistent (for find) or automatically deleted (for find and fix).

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps to Create a Content Store Maintenance Task

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.

4. Click the arrow on the new content maintenance button on the toolbar, and then click **New Consistency Check**.
5. Type a name and, if you want, a description and screen tip and click **Next**.
6. Choose the consistency check that you want:
   - To check the content store for inconsistencies, click **Internal references**.
   - To run content maintenance on namespaces, click **References to external namespaces** and select the namespaces that you want.
7. Click **Next**.
8. Choose the action that you want:
   - To run the task now or later, click **Save and run once** and click **Finish**. Specify a time and date for the run. Click **Find only** or **Find and fix**, and then click **Run**. Review the run time and click **OK**.
   - To schedule the task at a recurring time, click **Save and schedule** and click **Finish**. Then, select frequency and start and end dates. Click **Find only** or **Find and fix** and click **OK**.

     Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see "Manage Scheduled Activities" (p. 261).
   - To save the task without scheduling or running, click **Save only** and click **Finish**.

Steps to Run a Content Store Maintenance Task

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.
4. Click **Run with options** next to the content maintenance task.
5. Select the **Now** check box to run the content maintenance task immediately or the **Later** check box to set a day and time.
6. Click **Find** or **Find and fix**.
7. Click **Run**.

Enable Users to Open Series 7 PowerPlay Reports in Analysis Studio or Report Studio

Users can open Series 7 PowerPlay reports that are published to Cognos 8 in PowerPlay Web Explorer and run the reports in PowerPlay Web Viewer (p. 345). In addition, you can add an advanced setting that allows users to open their reports in Analysis Studio and Report Studio.

The migration and upgrade utilities must already be installed. For information about installing these utilities, see the Cognos 8 Migration and Upgrade Tools *Installation Guide*.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Click the arrow for the Actions menu next to **System**, and then click **Set properties**.
5. Click the **Settings** tab.
6. For the **Environment** category, in the **Name** column, next to **Advanced settings**, in the **Value** column, click **Edit**.
7. In the **Set advanced settings - configuration** page, in the **Parameter** column, type the following advanced setting:

   MIGR.EnablePPUpgrade

   Note that the setting name is case sensitive.
8. In the **Value** column, type **true**, and click **OK** twice.

   Tip: You can also delete this setting. To do this, click the check box next to the setting, click **Delete**, and click **OK** twice.

Tune Server Performance

Regardless of the size of your organization, you should include performance tuning as a regular part of administering servers. By tuning the configuration settings of dispatcher and services, you can optimize the speed and efficiency of Cognos 8.

For users, optimal performance means that their reports run fast and without errors. For you, it means that Cognos 8 is stable and that the users are happy.

Ideally, you want to tune the servers to meet the user demand at the peak usage times.

You may need to add dispatchers to your installation to meet the demands of users. Or, you may need to distribute your installation or upgrade the computer on which Cognos 8 is installed. For more information, see the *Installation and Configuration Guide* and the *Architecture and Deployment Guide*.

The level of logging (p. 74) can affect performance. When Cognos 8 logs more detail, more resources are allocated to logging and fewer resources are then available to run reports.

Before you change any settings, ensure that you tested dispatchers (p. 111), and reviewed the pertinent log messages (p. 72). You should also understand your performance requirements.

Models

Ensure that your models are optimized for reporting. For more information, see the Framework Manager *User Guide*.

Operating Systems

How Cognos 8 performs is tightly related to the performance of the operating system of the computer where Cognos 8 is installed. Therefore, it is important to ensure that your operating system is tuned.

Tuning Process

Tuning Cognos 8 includes

- setting server group names for advanced dispatcher routing
- balancing requests amongst dispatchers (processing capacity)
- using cluster compatible mode for dispatchers (load balancing)
- setting usage during peak periods
- setting the maximum number of processes and connections and affinity settings
- setting queue time limits
- setting PDF file character encoding, font embedding, and compression types and levels
- setting the maximum execution time
- limiting hotspots that are generated in and Analysis Studio or Report Studio chart
- setting retention time for watch list output
- setting compression for email attachments
- setting the report size limit for the report data service (governor limit)

Set Server Group Names for Advanced Dispatcher Routing

If you intend to define routing rules for reports (p. 107), you must set server group names for the dispatchers or configuration folders to which you want reports to be routed.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **All dispatchers**.

   Tip: You can also set the server group property at the system level.

5. Click the arrow for the Actions menu next to the dispatcher and click **Set properties**.
6. Click the **Settings** tab.
7. Select **Tuning** from the **Category** list.
8. Type a name in the **Value** column for the **Server Group** property.
9. Click **OK**.

   You can use this server group name when you define routing rules.

Balance Requests Among Dispatchers

If your installation includes more than one dispatcher, you can specify the proportion of requests that each dispatcher handles by changing their processing capacity. This is commonly referred to as load balancing. You typically set the capacity for a dispatcher based on the CPU speed of the computer where it is installed.

For example, a first dispatcher is installed on a 2 GHz computer and a second dispatcher on a 1 GHz computer. You set the processing capacity of the first dispatcher to 2.0 and the second to 1. 0. The first dispatcher handles two-thirds of the requests while the second handles one-third of the requests. If you set the capacity of both dispatchers to 1.0, requests are sent to each dispatcher alternately.

The default processing capacity for each dispatcher is 1.0.

Affinity settings (p. 125) take precedence over balance request settings.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Click the arrow for the Actions menu next to **System** and click **Set properties**.

   Tip: You can also change the processing capacity setting at the dispatcher level.
5. Click the **Settings** tab.
6. Select **Tuning** from the **Category** list.
7. In the **Value** column, type a new value for the **Processing capacity**, and then click **OK**.

   The new value takes effect immediately.

Use Cluster Compatible Mode for Dispatchers

If your Cognos 8 servers operate within a load balancing infrastructure, you can turn off the weighted round robin format of load-balancing for the dispatcher. Otherwise, load balancing may be duplicated by the cluster and by Cognos 8, which can degrade performance.

You can set the dispatcher property named loadBalancingMode either to weightedRoundRobin or clusterCompatible.

In weightedRoundRobin mode, the dispatcher sprays requests in a weighted round fashion, according to the configuration settings for the dispatcher (p. 123). This is the default mode.

In clusterCompatible mode, non-affinity requests are processed locally if possible. If there is no service on the local dispatcher, the request fails. This ensures that Cognos 8 respects any load balancing performed by your own load-balancing infrastructure.

You can set the loadBalancingMode property for single dispatchers or for a group of dispatchers in a configuration folder (p. 106). Because it is an inherited property, you can move dispatchers to a configuration folder and set the loadBalancingMode property for the folder to quickly set the property for a group of dispatchers.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Click the arrow for the Actions menu next to **System** and click **Set properties**.

   Tip: You can also change the load balancing setting at the dispatcher level.
5. Click the **Settings** tab.
6. Select **Tuning** from the **Category** list.
7. In the **Value** column, select the value for the **Load Balancing Mode**, either Weighted Round Robin or Cluster Compatible, and then click **OK**.

   The new value takes effect immediately.

Set Usage Peak Periods

Most organizations have a period of peak demand. This period is usually during business hours when employees are at work and run interactive reports. You can determine the start and end hours of the peak demand period for your organization.

During the peak period, you may want to set the number of connections and processes (p. 125) low enough so that jobs can run faster and system resources can process interactive requests from users.

During the non-peak period, you can set the number of connections and processes higher because demands on the system are lower.

The default peak period is from 07:00 to 18:00. The default number of connections for each service during the peak period and during the non-peak period is four.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **All dispatchers**.
5. Click the arrow for the Actions menu next to the dispatcher and click **Set properties**.
6. Click the **Settings** tab.
7. Select **Tuning** from the **Category** list.
8. In the **Value** column, type new values for the following settings:
   - **Peak period start hour**
   - **Non Peak period start hour**

   Tip: If you want to reset a configuration setting to its default value, select its check box and click **Reset to default value**.
9. Click **OK**.

Set the Maximum Number of Processes and Connections

For the report service, the batch report service, and the data movement service, you can set the maximum number of processes and the maximum number of high affinity and low affinity connections that the dispatcher can open to handle requests. For the agent, Content Manager, data movement, delivery, job, and report data services, you can set the maximum number of connections.

There are separate settings for peak and non-peak hours (p. 124).

Maximum Number of Connections

There is a maximum of one of each of these services per dispatcher: agent, Content Manager, data movement, delivery, job, report data. Connections handle one request from one service at a time.

You can specify the maximum number of connections for each service during peak periods and non-peak periods using the following settings:

- **Maximum connections for**<*service_name*> **service during non-peak period**

- **Maximum connections for<*service_name*> service during peak period**

The default number of connections is four.

Maximum Number of Processes

There can be multiple report service, batch report service, and data movement processes on each dispatcher. You can specify the maximum number of processes during peak periods using the following settings:

- **Maximum number of processes for the<*service_name*>during peak period**
- **Maximum number of processes for the <*service_name*>during non-peak period**

The default number of processes for each service is two.

Affinity Connections

In addition, report servers accept low and high affinity connections to process requests from the batch report and report services. Servers also accept low and high affinity connections to process requests from the data movement service.

Low affinity requests can be handled by any report server. Typically, low affinity requests are used when a report or data movement run is initially requested.

High affinity requests are ideally handled by a specific report server. Typically, high affinity requests are for reports that were already requested and may include actions, such as going to the next page in a report. If the specific report server is not available or busy, then the report is rerun (low affinity request) on any report server and the next page (high affinity request) is directed to that server.

Affinity settings take precedence over balance request settings (p. 123) and advanced routing settings (p. 107).

If affinity settings are changed for a service while entries are running, the number of server processes could double. The number of processes may temporarily exceed the maximum setting while the change takes effect. This may cause problems if your system does not have enough memory for the interim period.

For more information about affinity connections, see the *Architecture and Deployment Guide*.

You can specify the number of low and high affinity connections for the report service, the batch report service, and the data movement service using the following settings:

- **Number of high affinity connections for the<*service_name*> during peak period**
- **Number of high affinity connections for the <*service_name*> during non-peak period**

For batch report service, the default number of low affinity connections is two. For the data movement service and report service, the default number of low affinity connections is four. The default number of high affinity connections for all services is one.

Prerequisites

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services** and then click the service you want.
5. Click the arrow for the Actions menu next to the service and click **Set properties**.

   Tip: For report service and batch report service, you can also set some settings at the system or dispatcher level.
6. Click the **Settings** tab.
7. Select **Tuning** from the **Category** list.
8. In the **Value** column, type new values for the processes and connections that you want to change.

   Tip: If you want to reset a configuration setting to its default value, select its check box and click **Reset to parent value**.
9. Click **OK**.

Specify Queue Time Limits

You can specify the maximum number of seconds that interactive requests made by users wait in the queue for an available report service or data movement connection. If a request cannot be processed within the time limit, the request fails and users receive an error message.

If your operating system has adequate resources and Cognos 8 is properly configured, requests should not take longer than the time limit.

When you specify a time limit, consider the maximum number of seconds that you want users to wait for a response. The default queue time limit is 240 seconds.

Requests for the batch report service stay in the queue indefinitely.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.

4. Click the arrow for the Actions menu next to **System** and click **Set properties**.

   Tip: You can also change the queue time limit settings at the dispatcher or service level.

5. Click the **Settings** tab.

6. Select **Tuning** from the **Category** list.

7. In the **Value** column, type a new value for the **Queue time limit of report service (seconds)** or **Queue time limit of data movement service (seconds)** setting.

   Tip: If you want to reset a configuration setting to its default value, select its check box and click **Reset to default value**.

8. Click **OK**.

PDF File Settings

There are four settings for PDF files that together determine the speed at which PDF files are created and the size of PDF files.

The ideal settings are different for different environments. For example, if you create PDF files as part of batch jobs overnight, you may not care about speed. You may choose settings that create small files that can be easily distributed but take longer to generate. If you create ad hoc PDF files or complex PDF files with many charts and graphics, you may care more about speed than file size.

You can use different PDF file settings for report service and for batch report service.

PDF Character Encoding

PDF character encoding determines the character set that is used to create PDF files. You can choose to use Windows1252 encoding, the standard Windows single-byte encoding for Latin text in Western writing systems, or unicode (UTF-16) encoding. By default, PDF character encoding is determined automatically, based on the characters found in the file.

The settings names are:

- **PDF Character Encoding for report service**
- **PDF Character Encoding for batch report service.**

Value	Purpose
Windows1252	If you know your files contain only Windows1252 characters, use this setting for faster PDF file creation. Any unicode (UTF-16) character without a Windows1252 equivalent is converted to an indeterminate Windows1252 character.

Value	Purpose
Font	If you know your files contain non-Windows1252 characters (for example, Chinese characters), use this setting for faster PDF generation than with the Auto setting. PDF built-in fonts are all Windows1252 character encoded. Almost all other fonts use the UTF-16 character set. This setting typically creates larger PDF files than the Windows1252 setting. It is possible for UTF-16 encoded files to gain better compression (see "Content Compression Type" (p. 130).
Auto	Use this setting to automatically determine if Windows1252 or UTF-16 should be used to encode the text in the document. If large bodies of text must be analyzed, this is the slowest of the three settings. If speed is a concern you may choose to try the other values with various reports to determine the best setting for your environment. This is the default.

Font Embedding

To ensure that the fonts that areused in a report are available to all readers, fonts can be embedded in PDF files. In Cognos Configuration, there are two font embedding lists, one for the report service and one for the batch report service.

Fonts can be specified as always embedded or never embedded. For example, fonts that you do not have a legal right to redistribute may be specified as never embedded. Fonts that are not available at your remote sales offices but are required to read PDF reports may be specified as always embedded.

For more information about the font embedding lists, see the *Installation and Configuration Guide*

In **Cognos Administration**, you can allow or disallow font embedding in report service and batch report service PDF files. You can also choose automatic font embedding. Keep in mind that files with embedded fonts are larger and take more time to generate. Embedding fonts can cause a strain on network resources. Fewer embedded fonts can reduce network resource consumption.

The license for some fonts prohibits embedding. Ensure that you have permission from the vendor to embed licensed fonts.

The settings names are:

- **Option to allow the report service to embed fonts in generated PDF documents**

- **Option to allow the batch report service to embed fonts in generated PDF documents.**

There are specialized fonts, such as bar-code fonts, that are always embedded when used. These settings do not control embedding of specialized fonts. PDF built-in fonts are never embedded.

Value	Purpose
Allow	If you know that your audience does not have all the fonts they need to view PDF reports, use this setting. Files are larger and PDF output is generated more slowly. Fonts that are in the never embed list in Cognos Configuration are prevented from being embedded. This is the default.
Disallow	If you know that your audience has all the fonts they need to view PDF reports, use this setting. Files are smaller and are generated faster. Fonts are not embedded unless they're in the always embed list in Cognos Configuraiton.
Auto	Automatically determines which fonts to embed. This setting takes the longest time to generate PDF reports. If the data contains only Windows1252 characters, both the always embed and the never embed list in Cognos Configuration are used. If there is a conflict, the never embed list is used. Except for specialized fonts, unlisted fonts are usually embedded only if UTF-16 characters from that font are used in the file.

Content Compression Type

You can set the compression type to use when PDF reports are created. It takes longer to create PDF output for files with a higher compression type but the resulting files are smaller.

The content compression type specifies which data is compressed. The "Content Compression Type" (p. 130) specifies how much the data is compressed. The combination of the two settings determines the final file size.

The settings names are:

- **The PDF compression type for PDF documents created by the report service**
- **The PDF compression type for PDF documents created by the batch report service.**

The choices for this setting, from lowest to highest compression type, are: **Classic**, **Basic**, **Improved**, **Advanced**, and **Full**. **Classic** is the default.

Compression type refers to the amount of data that is compressed within a PDF report. Typically, less compression means faster compression and a larger document. Versions of the Adobe PDF Acrobat Reader earlier than version 6.0 do not support compression types higher than Classic.

There are rare cases where compression causes small files to become slightly larger.

Compression Algorithm Level

You can specify the compression algorithm level to use when PDF files are created.

The content compression type specifies which data is compressed. The "Compression Algorithm Level" (p. 131) specifies how much the data is compressed. The combination of the two settings determines the final file size.

The settings names are:

- **Content Compression level for PDF documents created by the report service**
- **Content Compression level for PDF documents created by the batch report service**

Valid choices for compression algorithm level are 0 (no compression) to 9 (maximum compression) . The default is 9.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Service**, and the service you want.
5. Click the arrow for the Actions menu next to the service and click **Set properties**.
6. Click the **Settings** tab.
7. Select **Tuning** from the **Category** list.
8. In the **Value** column, type the value that you want for each of the PDF file settings.

   Tip: If you want to reset a configuration setting to its default value, select its check box and click **Reset to default value**.
9. Click **OK**.

Set Maximum Execution Time

You can set the maximum execution time for the report service, batch report service, and data movement service. If the time limit is exceeded, the execution is cancelled.

For example, you may want to limit execution time if you know that there is something wrong if tasks take longer. You may also want to ensure that no one task monopolizes server time to the detriment of others.

The default is zero, which specifies no limit on execution time.

This setting has priority over the governor limit setting. See "Set the Report Size Limit for the Report Data Service" (p. 135).

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services** and the service you want.

   Tip: You can also change the queue time limit settings at the dispatcher or service level.
5. Click the arrow for the Actions menu next to the service and click **Set properties**.

   Tip: You can also set these service settings at the **System** level.
6. Click the **Settings** tab.
7. Select **Tuning** from the **Category** list.
8. In the **Value** column, type a new value for the **Maximum execution time for the** <*service_name*> **(seconds)** setting.
9. Click **OK**.

Specify How Long to Keep Watch List Report Output

You can keep watch list report output for a specific number of runs or for a specific number of days or months. For example, you can keep up to 10 versions or you can keep the report output versions for 2 days or 6 months.

There are two settings:

- If you want to specify the maximum length of time to keep watch list report output, use the **Periodical document version retention age** setting. The default is 1 day. In the **Settings** pane, this appears as P1D. If you set it to 2 months, it appears as P2M.
- If you want to specify the maximum number of copies to keep, use the **Periodical document version retention count** setting. There is no default.

If you specify both settings, whichever is reached first determines how many versions are kept.

The settings that you choose depend on how often watch list report output is generated and your system resources. For example, if a report runs nightly to provide output during the day on demand via the portal and watch lists are updated on a weekly basis, you may only want to keep four version each month, but no more than 5 versions during that time. If a job is used to run reports and watch lists are updated only when the job is run, you may only want to keep 1 version each day.

For more information on watch lists, see (p. 336).

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Click the arrow for the Actions menu next to **System** and click **Set properties**.
5. Click the **Settings** tab.
6. Select **Tuning** from the **Category** list.
7. In the **Value** column, type a new value for the **Periodical document version retention age** setting and select **Day(s)** or **Month(s)** from the drop-down menu.
8. In the **Value** column, type a new value for the **Periodical document version retention count** setting.
9. Click **OK**.

Limit Hotspots That are Generated in an Analysis Studio or Report Studio Chart

A hotspot in a chart appears when you pause your mouse over it. For example, a drill-down symbol, or a tooltip that gives details about the column, line, or pie slice. When charts with many members are generated, the increased usage of system resources may freeze the browser. Response time increases with the number of hotspots. You may want to limit the number of hotspots that are generated for Analysis Studio and Report Studio charts to improve performance.

When you limit the number of hotspots, priority is given to items such as axis labels and legend labels before individual graphical elements such as bars, pie slices, and so on. Depending on the number of items in a chart and the setting for maximum number of hotspots, some axis items may have hotspots while other axis items and all graphical elements do not, or all axis items and some graphical elements may have hotspots while other graphical elements do not.

The maximum hotspot setting in Report Studio overrides this setting. For more information, see the Report Studio Professional Authoring*User Guide*.

The default is an unlimited number of hotspots.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch, Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Click the arrow for the Actions menu next to **System** and click **Set properties**.

   Tip: You can also change the hotspot setting at the dispatcher or service level.
5. Click the **Settings** tab.
6. Select **Tuning** from the **Category** list.
7. Locate the **Number of hotspots generated in a chart by the Batch report service** or the **Number of hotspots generated in a chart by the Report service** setting. In the **Value** column, click the arrow next to **Unlimited** and then click **<Number>**. Type a new value for the maximum number of hotspots
8. Click **OK**.

Set Compression for Email Attachments

In Cognos 8, you can choose to compress email attachments above a specific size, or disable compression. By default, compression is disabled. If you want email attachments compressed, change the default behavior using the configuration setting, **Maximum size of an uncompressed email attachment in MB**.

An email attachment must be at least 1MB to be compressed.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch, Cognos Administration**.
3. On the **Configuration** tab, click **Dispatcher and Services**.
4. Click the dispatcher you want.
5. For **DeliveryService**, click the set properties button.
6. Click the **Settings** tab.
7. To filter the settings, in the **Category** box, click **Tuning**.
8. Specify a value for the **Maximum size of an uncompressed email attachment in MB** setting. The following settings that are available.

Goal	Action
Disable compression	Type 0 (zero). This is the default setting.
Compress email attachments if the attachment is greater than *n*. *N* is the size of the attachment in MB.	Type *n*, where *n* is the size of the attachment in MB.

9. Click **OK**.
10. Click the **Configuration** link in the path at the top of the page.

    You return to the list of dispatchers.
11. If you have more than one dispatcher configured, perform steps 4 to 10 for each remaining dispatcher.
12. Using Cognos Configuration, stop and then restart Cognos 8.

    For information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Set the Report Size Limit for the Report Data Service

To limit the resources, such as memory, that are used by Report data service, Cognos 8 restricts the size of the report data that can be sent out. If you receive errors in Cognos 8 Go! Office that a report result is too large, you can increase the size limit for report data by changing the Governor limit setting.

The maximum execution time setting (p. 131) has priority over this setting.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, and then click **Report Data**.
5. Click the arrow next to **ReportDataService** to view the Actions menu, and then click **Set properties**.
6. Click the **Settings** tab.
7. In the **Value** column, change the number for **Governor limit (MB)**.
8. Click **OK**.

Set Parameters for Concurrent Query Execution

By default, Cognos 8 executes queries in a report sequentially. Depending on your environment, you may be able to improve report run performance by enabling concurrent query execution. You can do this by setting advanced server properties for the report service, the batch report service, or both. When concurrent query execution is enabled, the report server determines which queries in the report can be run concurrently.

The report author must specify the queries in a report that are candidates for concurrent execution. For more information, see the Report Studio Professional Authoring *User Guide*.

Parameter	Purpose
RSVP.CONCURRENTQUERY. NUMHELPERSPERPROCESS	Enables concurrent query execution and sets the maximum number of query execution helpers for each report service or batch report service process. Each query execution helper results in an additional data source connection. For example, a report service has four processes with two high affinity connections and two low affinity connections: • If the maximum number of query execution helpers is set to 0 (disabled), the maximum number of data source connections created by the report service is 16 (two low affinity connections plus two high affinity connections plus zero query execution helpers times four processes). • If the maximum number of query execution helpers is set to 2, the maximum number of data source connections created by the report service is 24 (two low affinity connections plus two high affinity connections plus two query execution helpers times four processes). The calculated maximum number of data source connections applies to each report service or batch report service process. Default: 0 (concurrent query execution disabled)

Parameter	Purpose
RSVP.CONCURRENTQUERY. MAXNUMHELPERSPERREPORT	The maximum number of query execution helpers for each report. Use this property to prevent a single report from consuming all available query execution helpers. For example, a report has eight queries that can run concurrently: • If RSVP.CONCURRENTQUERY.NUMHELPERSPERPROCESS and RSVP.CONCURRENTQUERY.MAXNUMHELPERSPER REPORT are both set to four, the report consumes all query helpers when executed. No other report is able to run queries concurrently until the report has finished executing. • If RSVP.CONCURRENTQUERY.MAXNUMHELPERSPERREPORT is set to two instead, the report consumes two query helpers, leaving two for other reports to use. Default: 1 This setting has no effect unless RSVP.CONCURRENTQUERY.NUMHELPERSPERPROCESS is set to greater than 0.
RSVP.CONCURRENTQUERY. ENABLEDFORINTERACTIVEOUTPUT	Enables concurrent query execution when the report service is producing interactive output. For interactive reports, if concurrent query execution is enabled, some queries may be unnecessarily executed because the results are not used. For example, all the queries for a multi-page report may execute with at least one query on each page, but the user may view only the first page. If you do not want to use resources for results that are not used in interactive reports, disable this parameter. Authored prompt pages are not interactive output and are not affected by this setting. Default: false (disabled)

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, and then click (**All**).
5. Click the arrow for the Actions menu next to a Report or Batch report and click **Set properties**.
6. Click the **Settings** tab.
7. Click the set properties button for the report or the batch report service.
8. Click the **Settings** tab.
9. Click **Edit** next to **Advanced Settings**.
10. Select **Override the settings acquired from the parent entry**.
11. In the **Parameter** column, enter a parameter name.
12. In the **Value** column, enter the setting that you want to use.
13. Click **OK**.
14. On the **Set properties** page, click **OK**.

Set Query Prioritization

When you run a report with prompt controls defined, all parameter information is retrieved, including parameter information defined in the report, the model, and the data source. This is required for data typing and to align capabilities for prompt controls with those of its associated parameter. This operation can impact performance, especially when there are many or complex queries. From the user perspective, it can take too long to present the first prompt page or report page.

To increase speed, report authors can set a query hint in Report Studio, Use For Parameter Info, to give a query priority in determining parameter information. Queries are prioritized based on where they are used and whether they contain filters. A priority group is the set of queries sharing similar attributes, such as a filter. Instead of retrieving the parameters for all the queries at the same time, parameters for queries with author-defined priority are retrieved first, regardless of how automated query prioritization is set. For more information about parameters, filters, and prompt controls, see the Report Studio Professional Authoring*User Guide*.

Queries are grouped by priority as shown in the following table. When a query group has sub-groups, the first sub-group has priority over the second.

Query group	Priority
Queries with the **Use for Parameter Info** property set to Yes in Report Studio	1
Queries with defined filters that are not used to populate prompt controls • First reference to such queries • Subsequent references to such queries	2
Queries with defined filters that are used to populate prompt controls • First reference to such queries • Subsequent references to such queries	3
Queries with no defined filters that are not used to populate prompt controls • First reference to such queries • Subsequent references to such queries	4
Queries with no defined filters that are used to populate prompt controls • First reference to such queries • Subsequent references to such queries	5

To specify a system-wide configuration that defines how queries and query groups are processed, you can assign either a setting value or name to the report server advanced setting, RSVP.PROMPT.RECONCILIATION. This allows you to specify the degree of reconciliation between prompt control capabilities and data type to that of the associated parameter. The setting you choose determines whether reconciliation accuracy or speed is more important. For example, if the report author ensures that parameters are defined with the same datatype and capabilities (i.e., optionality, cardinality, and discreteness), across all queries, specifying CHUNKED or 3 would likely achieve the best performance in the widest variety of situations.

RSVP.PROMPT.RECONCILIATION.CHUNKSIZE lets you specify chunk size. This setting is applicable when you use CHUNKED GROUPED and CHUNKED. The default chunk size is 5.

The report server advanced properties and Report Studio query hints work cooperatively to provide the best performance.

You can use the settings shown in the following table to configure RSVP.PROMPT.RECONCILIATION.

Setting	Name	Purpose
0	COMPLETE	All queries are sent at once. This is the slowest, most accurate form of reconciliation. This is the default setting.
1	GROUPED	Queries are sent by priority group. This setting works best for reports that have many unfiltered queries and few filtered queries. It provides medium speed and high reconciliation accuracy.
2	CHUNKED GROUPED	Queries are sent by priority group with a maximum number per request. The queries do not span groups. This setting works best on reports that have many queries with similar filter expressions. It provides maximum speed and low reconciliation accuracy.
3	CHUNKED	Queries are sent by priority group with a maximum number per request. The queries can span groups.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu.
   Click **Services**, and then click (**All**).
5. Click the arrow for the Actions menu next to a Report or Batch report and click **Set properties**.
6. Click the **Settings** tab.
7. Click **Edit** next to **Advanced Settings**.
8. Select **Override the settings acquired from the parent entry**.
9. In the **Parameter** column, enter a parameter name.
10. In the **Value** column, enter the setting that you want to use.
11. Click **OK**.
12. On the **Set properties** page, click **OK**.

Reduce Decimal Precision

In cross tab reports, values may contain a maximum of 19 total digits. Decimal precision determines how many of these digits are reserved for expressing the decimal component of a number with the remaining digits available to express the integer component.

By default, decimal precision is set to 7 digits, which restricts the length of integers to 11 digits (since one digit is reserved for the decimal separator). If you want to use more than 11 integers, you must reduce the decimal precision. For example you may choose to set decimal precision to 2, which allows you to express up to 16 digits of integers.

Steps

1. Copy the *c8_location*/configuration/CQEConfig.xml.sample file to *c8_location*/bin and rename it CQEConfig.xml.
2. Open the *c8_location*/configuration/CQEConfig.xml in an editor.

   Ensure that your editor supports saving files in UTF-8 format.
3. Find the **crosstabDecimalPrecision** parameter and decrease the value to the decimal precision that you want.
4. Save the CQEConfig.xml file.
5. Using Cognos Configuration, stop and then restart Cognos 8.

   For information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Saved Report Output

By default, the report output files are saved in the content store. You have also have the following choices for saving report output files:

- You can save a copy in another file location outside of Cognos 8 so that you can share it with external applications or people who don't have Cognos 8 (p. 142). This is how most report output files are saved.
- You can save a copy in another file location inside Cognos 8 so that it can be used again (p. 141). This may also be useful for archive purposes, since files that are saved in the Content Store may be deleted regularly due to retention rules.

A descriptor file with an _descr extension is also saved. Saved files are not managed by Cognos 8.

Set File Location to Save a Copy of Report Output Outside of Cognos 8

You can specify that an additional copy of report output be saved in a file system outside of Cognos 8. For example, users may want to share a report with an external application, such as a web site, and have it saved there every time it is updated so that current content is always available. Users may also want to save reports on a Local Area Network for people who do not have access to Cognos 8.

In Cognos Connection, if users select **Save to the file system** as the report delivery method (p. 332) when they run or schedule a report, the files are saved in the specified location each time the report runs.

There are two associated properties in Cognos Configuration that must be set first: one enables saving file output to a file system, the other specifies the root directory for saving files. For more information, see the Cognos 8 *Installation and Configuration Guide*.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Dispatchers and Services**.
4. On the toolbar, click the Define File System Locations button .
5. Click **New**.
6. Enter a name, description, and screen tip.
7. In **File systems location** box, type the location where you want to save report output files.

   The location that you type is appended to the **File system root location**.
8. Click **Finish**.

Set File Location to Save Copy of Report Output in Cognos 8

By default, report output files are saved in the content store. For single-file report outputs, you can also save a copy of the output in a file location in Cognos 8 so that you can use it again. This may also be useful for archive purposes, since files that are saved in the Content Store may be deleted regularly due to retention rules.

The following formats can be saved: PDF, .csv, XML, Excel 2002, and HTML that does not have embedded graphics. You cannot save HTML fragment, XMTML, or Excel 2000 or 2007 single sheet formats.

In Cognos Connection, if users select **Save to the file system** as the report delivery method (p. 332) when they run or schedule a report, the files are saved in the specified location each time the report runs.

The file location applies to saved output originating from the selected Content Manager service.

Report Output Descriptor File

When you save report outputs files to a file system in Cognos 8, a report output descriptor file is also created. The descriptor file is an XML file that contains information about the report output,

such as the name, locale, creation time, owner user name and authentication namespace, the associated report search path, burst key information, and the report version contact.

The descriptor file takes the same name as the output file, with the suffix _descr added. For example, a saved PDF report with the name 158_1075940415360.pdf has a descriptor file with the name 158_1075940415360_desc.xml.

Post-processing Scripts

You can also specify a script so that you can run post-processing commands each time a report output is copied to the file system. For example, if your report output files are ultimately stored in an archiving system, you can use a script to perform this action.

Settings

You can use the settings that are listed in the following table.

Parameter	Purpose
CM.OutPutLocation	The location where you want to store copies of report output files. Old report versions are not deleted when a new one is saved. You must manage the content of the output directory to keep the report versions you want.
CM.OutputScript	The location and name of a shell script, such as a .bat or .sh file, that runs after a report output is saved to the target directory. The full file names of the output file and descriptor are passed to the script.
CM.OutputByBurstKey	When report output is distributed by bursting, it is assigned a burst key. Specify whether to store output in a subdirectory with the same name as the burst key. Default: false (output not stored by burst key)

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, and then click **Content Manager**.
5. Click the arrow next to **ContentManagerService** to display the Actions menu, and then click **Set properties**.

6. Click the **Settings** tab.
7. Click **Edit** next to **Advanced Settings**.
8. Select **Override the settings acquired from the parent entry**.
9. In the **Parameter** column, enter the parameter name.

   For example, enter **CM.OutPutLocation**.
10. In the **Value** column, enter the associated value for the setting.
11. Continue entering setting names and values as required.
12. Click **OK**.
13. On the **Set properties** page, click **OK**.

Enable Job, SMTP, and Task Queue Metrics

By default, only the queue length metric for job, task, and SMTP queue metrics is enabled. The following metrics are also available for each but are set to zero and do not appear in the user interface unless you enable them:

- **Time in queue high water mark**
- **Time in queue low water mark**
- **Time in queue**
- **Number of queue requests**
- **Queue length high water mark**
- **Queue length low water mark**

For more information about these metrics, see "System Performance Metrics" (p. 83). Note that enabling these settings may affect performance.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. Click the arrow next to **System** to display the Actions menu, and then click **Set Properties**.
5. Click the **Settings** tab.
6. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.

7. If it appears, select the **Override the settings acquired from the parent entry** check box. Otherwise, proceed to the next step.
8. In the **Parameter** column, type the following settings: **enable.tide.metrics.smtpqueue**, **enable.tide.metrics.jobqueue**, and **enable.tide.metrics.taskqueue**.
9. Beside each parameter, in the **Value** column, type **True** to enable the metric.
10. Click **OK**.
11. Open the *c8_location*/webapps/p2pd/WEB-INF/classes/iManage-metadata.xml file in a n editor.

    Ensure that your editor supports saving files in UTF-8 format.
12. Uncomment the sections that begin with `<!-- These metrics have been explicitly disabled. Please consult documentation on how to enable them. -->`
13. Save the file.
14. Using Cognos Configuration, stop and then restart Cognos 8.

    For information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Disable Session Caching

In Report Studio, Query Studio, and Cognos Viewer the results for previous requests to the database are cached for the duration of a session when session caching is enabled. To increase performance, for subsequent queries, Cognos 8 uses cached results for some actions rather than accessing the database. This applies when the same results can be used or when the new results are a subset of the cached results. You can enable session caching at the server level or at the package or report level.

Because performance may be affected, you may want to leave session caching disabled at the server level in the following situations:

- users expect up-to-date results directly from the database for every query, for example new records that were added to the database in the interim
- you want to limit the number of times the cache is accessed during a session

You may also want to leave session caching disabled for individual reports because of high resource consumption, for example, reports that use bursting.

You can also enable and disable session caching for specific queries in reports in Report Studio (see the Report Studio Professional Authoring *User Guide*) and for models in Framework Manager (see the Framework Manager *User Guide*).

Session caching for new models and reports is enabled by default. Existing packages and reports retain existing session caching settings.

Steps to Disable at Server Level

1. Copy the *c8_location*/configuration/CQEConfig.xml.sample file to c8_location/bin and rename it CQEConfig.xml.
2. Open the *c8_location*/bin/CQEConfig.xml in an editor.
3. Ensure that your editor supports saving files in UTF-8 format.
4. Find the queryReuse parameter and change the value to 0.
5. Save the CQEConfig.xml file.
6. Using Cognos Configuration, stop and then restart Cognos 8.

For information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Steps to Disable at Package or Report Level

1. Copy the *c8_location*/configuration/CQEConfig.xml.sample file to c8_location/bin and rename it CQEConfig.xml.
2. Open the *c8_location*/bin/CQEConfig.xml in an editor.
3. Ensure that your editor supports saving files in UTF-8 format.
4. Find the queryReuse parameter and remove it.
5. Save the CQEConfig.xml file.
6. Using Cognos Configuration, stop and then restart Cognos 8.

For information about stopping Cognos 8, see the *Installation and Configuration Guide*.

For information on disabling session caching at the package level, see the *Framework Manager User Guide*. For information on disabling session caching at the report level, see the Report Studio Professional Authoring *User Guide*.

Chapter 6: Data Sources and Connections

Before you can create models in Framework Manager, the Cognos 8 modeling tool, and run reports or analyses from Cognos 8, you must define data sources. A data source defines the physical connection to a database. The data source connection (p. 162) specifies the parameters needed to connect to the database, such as the location of the database and the timeout duration. A connection can include credential information and signons (p. 171).

You can make more than one data source connection available by combining them, along with other elements, in packages created in Cognos Connection (for OLAP data sources) or created and published using Framework Manager. For example, you can create and publish a package that contains two IBM DB2 OLAP data sources, where each one defines a connection to a different cube. When more than one data source is available in a package, users are prompted to select a data source connection and a signon when they run a report. Their choice is saved for the duration of the session and as a default value for the next time users run the same report. For information about creating and publishing packages, see the Framework Manager *User Guide*.

You can secure data sources using Cognos 8 authentication. Cognos 8 authentication respects any security that is also defined within the data source (p. 173).

You move data sources from one environment to another environment by deploying the entire content store (p. 277).

Cognos Cubes

Cognos 8 provides support for accessing secured Cognos cubes as data sources. These cubes include PowerCubes generated by Transformer 7.3 and later, Cognos Finance multi-dimensional cubes, and Cognos Planning - Contributor cubes. To access a Cognos cube that is secured to a Series 7 namespace, you must first log into the Series 7 namespace.

Transformer 8.3 supports Cognos 8 security, including the Series 7 namespace. You can also transition custom views to the Cognos 8 namespace. When you connect to a Cognos cube that is secured with Cognos 8 security, you must be logged into the namespace the cube was designed with before accessing the cube.

For information about integrating Cognos Finance multi-dimensional cubes in your Cognos 8 environment, see the Cognos Finance *User Guide*. For information about connecting to the Cognos Planning - Contributor unpublished (real-time) data, see the Cognos Planning *Installation Guide*.

Cognos supports the deployment of Cognos 8.3 PowerCubes in production environments that are secured against a single namespace. PowerCubes that are secured against multiple namespaces are not supported in production environments. For this reason, when you deploy cubes for use in production, ensure that they are secured against one namespace. To do this, select the option **Restrict PowerCube authentication to a single namespace** in the Signon properties. For more information, see the Transformer *User Guide*.

For PowerCubes, the connection information in Cognos Connection provides both a Windows and UNIX path to a cube file. If all of your report servers are installed on Windows computers, you need only use the Windows path in Cognos Connection. Similarly, if all of your report servers are installed on UNIX computers, then you need only use the UNIX path in Cognos Connection.

Note: If you are using Framework Manager, the Windows path to the PowerCube is required.

If you have report servers installed on both Windows and UNIX computers and you want the report server running the request to have access to the PowerCube in both environments, you can use both the Windows and UNIX paths in Cognos Connection. To ensure that the same data is returned regardless of the environment in which the report server accesses the cube, the same cube file must be saved in the locations specified by the Windows and UNIX paths in Cognos Connection.

PowerCubes can only be created in the Linux environment if you are using Transformer 8.3 and a Cognos 8 security provider. However, you can deploy secured Series 7 PowerCubes to Linux computers running as report servers in the Cognos 8 environment. The Content Manager computer must be running on a Series 7-compliant platform.

Tips

- If you are testing the migration of your Series 7 PowerCubes to Cognos 8, you can select the authenticate with **All applicable namespaces** method.
- If a PowerCube that you have already created a connection for has to be updated, you can update the connection in Cognos 8 without affecting users who may be currently accessing the original PowerCube.
- When you use Series 7 PowerCubes as data sources, we recommend that you optimize them for Cognos 8. Optimized PowerCubes provide faster data retrieval at runtime. You optimize PowerCubes using a command line utility named pcoptimizer, which is supplied with Cognos 8. For more information about optimizing PowerCubes, see the Troubleshooting section in this guide.
- If a cube contains security views and you are logged on as Anonymous, you will receive an error message. This is because Cognos 8 cannot validate the user "Anonymous" against the Cognos 8 namespace user credentials. To avoid this situation, log on to the Cognos 8 namespace with a user ID and password, and then publish the cube.

XML Data Sources

If you create an XML data source, you must use XML as the type of connection and specify the location of the XML document in the connection string.

You can specify the connection string for an XML data source as:

- an HTTP URL that identifies the content store required to connect to the XML document.

  An example is HTTP://xmltestserver.cognos.com/XML/country.xml.

  Ensure that you create a Web alias for the directory that contains the XML file and that you enable directory browsing.

- a file path

  A Windows file path example is *servername*\XML\country.xml.

  A UNIX file path example is */mount name*/XML/country.xml.

- a local file

  An example is C:\XML\country.xml;VALIDATE=ON.

To access a local file, use a file path that uses platform-specific syntax.

To test an XML connection string, you must type the following code at the end of the string:
`;VALIDATE=ON`

The text of this code is not case sensitive.

Parameterized XML Connection Strings

In an HTTP URL connection string for an XML data source, you can use parameters to send additional information. You can embed a prompt definition string in the parameter component.

If the prompt definition is specified in the report, that value is used. Otherwise, the user is prompted to supply a value. Prompting is not supported for other types of connection strings.

An example of a URL component is addressing_scheme://*network_location*/path;parameters?query#fragment_identifier

Encode the parameter component with the definition string in between two sets of question marks. A prompt cannot cross a component boundary.

An example of a parameterized XML string is http://*My_Network_Location*/*My_Path*/myxml.asp?countrysid=??CanadaPrompt??

Parameterized XML connection strings have these restrictions:

- When a URL component is a prompt, it cannot contain other data.
- Prompts embedded in XML connection strings do not work in Framework Manager. You cannot import data from a parameterized XML connection string.
- When you set up a parameterized XML connection string in Cognos Connection, the Test button does not work.
- Validation of the query specification in Report Studio does not work if you are connected to a parameterized XML connection string.

Microsoft SQL Server Data Sources

Depending on the types of Microsoft SQL Server data sources you are using, there are considerations you should keep in mind when defining some types of authentication.

Authentication Using Cognos 8 Service Credentials

When connecting to Microsoft SQL Server using OLE DB, you can select **Cognos 8 Service Credentials** as the signon type for the data source connection. This property instructs Cognos 8 to

log on to the SQL Server database using the logon specified for the Cognos 8 service. Users do not require individual database signons. However, all users will authenticate to the database with the same credentials and will have the same view of the data. For production environments, individual database signons are generally more appropriate.

You should not use a Windows local system account for the Cognos 8 server logon with a Microsoft SQL Server OLE DB data source.

Authentication Using an External Namespace

You can configure Cognos 8 to use a Microsoft Active Directory namespace, where users are prompted for credentials as part of the Cognos 8 logon process. You can configure Cognos 8 to use these same credentials automatically when accessing the Microsoft SQL Server data source. The data source connection for Microsoft SQL Server must be configured for **An External Namespace** and that namespace must be the Active Directory namespace.

You can configure Cognos 8 to use a Microsoft Active Directory namespace and to authenticate users for Cognos 8 using Kerberos authentication and delegation. You can configure Cognos 8 to automatically authenticate the user when accessing the Microsoft SQL Server data source. The following configuration is required:

- The Cognos 8 gateway must be installed on an IIS Web server that is configured for Windows Integrated Authentication.
- Content Manager must be installed on a Windows 2003 or Windows XP server.
- Content Manager, the report server (Application Tier Components), IIS Web server, and the data source server (Microsoft SQL Server) must belong to the same Active Directory domain.
- The data source connection for Microsoft SQL Server must be configured for **An External Namespace** and that namespace must be the Active Directory namespace.
- The report servers are trusted for delegation.

For more information about installation options for the gateway and Content Manager, as well as configuring the namespace and delegating trust, see the Cognos 8 *Installation and Configuration Guide*.

Microsoft Analysis Services Data Sources

When creating a connection to a Microsoft Analysis Services data source, you must specify a language. By default, the language is set to that of your computer's regional setting. You can have only one language selection for a connection. For more information, search the Microsoft Web site (http://www.microsoft.com) or Microsoft Support Web site knowledge base (http://support.microsoft.com) for "locale identifier property".

If you want to publish a Framework Manager model that uses a different locale setting than a previously published model, you must first restart the Cognos 8 service.

Cognos 8 and PowerPlay Enterprise Server support connectivity to Microsoft Analysis Services only from a Windows platform, and both require the Microsoft Pivot Table client libraries. The following configuration is required:

- Cognos 8 Service must run as a domain account, and this domain account must be trusted for delegation and impersonation because it will present the user's credentials to Microsoft Analysis Services.
- The domain account should be added in local security settings in your Windows operating system administration tools.

  Note: You must restart your server after changing this property.
- The domain account should be a member of the OLAP Administrators group on the Microsoft Analysis Services computer.
- The OLE database for OLAP (ODBO) client must be installed. This is included in the Microsoft Analysis Services installation files.

Authentication to an External Namespace

You can configure Cognos 8 to use a Microsoft Active Directory namespace, where users are prompted for credentials as part of the Cognos 8 logon process. You can configure Cognos 8 to use these same credentials automatically when accessing the Microsoft Analysis Services data source. You must configure the data source connection for Microsoft Analysis Server for **An External Namespace** and that namespace must be the Active Directory namespace.

You can configure Cognos 8 to use a Microsoft Active Directory namespace and to authenticate users for Cognos 8 using Kerberos authentication and delegation. You can configure Cognos 8 to automatically authenticate the user when accessing the Microsoft Analysis Services data source. The following configuration is required:

- The Cognos 8 gateway must be installed on an IIS Web server that is configured for Windows Integrated Authentication.
- Content Manager must be installed on a Windows 2003 or Windows XP server.
- Content Manager, the report server (Application Tier Components), IIS Web server, and the data source server (Microsoft Analysis Server) must belong to the same Active Directory domain.
- The data source connection for Microsoft SQL Server must be configured for **An External Namespace** and that namespace must be the Active Directory namespace.
- The report servers are trusted for delegation.

For more information about installation options for the gateway and Content Manager, as well as configuring the namespace and delegating trust, see the Cognos 8 *Installation and Configuration Guide*.

ODBC Data Sources

If you are connecting to an ODBC data source that has been set up as a user DSN, ensure that the service using the connection is running as the user who created the data source. System DSNs are not restricted to the user who created the data source.

Note: In order to create and test reports with user DSN data sources, you must set up the Cognos8 service with a user account. User DSN data sources are invisible under a system account.

When you create connections to ODBC data sources, select the vendor-specific data source type, such as Microsoft SQL Server (ODBC), from the **Type** menu in the **New Connection** wizard.

Select ODBC to connect to an ODBC data source type that does not appear in the menu.

Database vendor	Database code
IBM Red Brick	RB
Microsoft SQL Server	SS
NCR Teradata	TD
ODBC	OD

IBM DB2 OLAP and Hyperion Essbase Data Sources

IBM DB2 OLAP and Hyperion Essbase data sources are interchangeable and Cognos 8 works with them in exactly the same way. For example, you can connect to an Essbase data source using a DB2 OLAP connection. When you define the data source, you must choose the specific cube for the data source.

Before connecting to a DB2 OLAP or Essbase data source, some configuration is required if the data source uses scenario dimensions, balanced hierarchies, or measures.

Performance Considerations

You must choose either simple or query outlines when making calls in Essbase API.

Base your choice on the performance that you need and factors such as your network environment, the size of the databases, and the types of queries.

Simple Outline

Use simple outline if you primarily run simple queries and use numerous cubes. If you use this option for large cubes, your queries may take a long time to run. Large temporary files may also be created as Essbase builds the necessary grid. After the grid is created, these queries typically run faster and do not increase network traffic. However, more memory is consumed.

This option is the default behavior in the Cognos environment.

Query Outline

Use query outline if you run numerous, complex, or advanced queries that use Cognos 8 features such as nested filtering or sorting.

To enable this option, edit the qfs_config.xml file in the cognos 8 location\configuration directory. Type the following line at the end of the <parameters> subsection of the DB2OlapODP provider section:

```
<parameter name="UseSecondOutline" value="true"/>
```

Configure Scenario Dimensions

If you connect to a DB2 OLAP data source and it contains a scenario dimension, you must manually configure the scenario dimension so that Cognos 8 recognizes it. Otherwise, Cognos 8 will treat the scenario dimension as a regular dimension.

Step

- In the Hyperion Solutions Essbase Administration Services tool, assign a User Defined Attribute (UDA) named COGNOS_SCENARIO_DIMENSION to the scenario dimension.

Specify Balanced Hierarchies

DB2 OLAP Provider does not determine if a hierarchy is balanced or unbalanced. It considers all hierarchies as being unbalanced by default.

In a balanced hierarchy, each path descends to the same depth while the branches in an unbalanced hierarchy descend to different levels.

Steps to Specify Balanced Hierarchies

1. In the Hyperion Solutions Essbase Administration Services tool, create a special User Defined Attribute (UDA) named COGNOS_HIERARCHY_BALANCED in the outline of the DB2 OLAP database. The UDA is created for the root member of the corresponding dimension containing a balanced hierarchy.
2. Set the attribute to 1.

Specify Measure Formats

To improve the readability of the values reported, you can specify an alternative format string for any measure. Define a UDA for the appropriate members in the Account dimension:

`COGNOS_FORMAT=`*`format_string`*

The *format_string* value can be any one of the predefined number formats listed in the table below. You can use a preset numeric format to show values as millions (M) or thousands (K). For example, 1,801,791 can be shown as 1.8M or 1,801.8K.

The predefined format strings are as follows:

Format Option	Sample Value	Example
General	1000000	1000000
0	1000000	1000000
#,##0	1000000	1,000,000
$0	1000000	$1000000
$#,##0	1000000	$1,000,000
0%	1000000	100000000%
%0	1000000	%100000000
0E+000	1000000	1E+006
0K	1000000	1000K
#,##0K	1000000	1,000K
K0	1000000	K1000
K#,##0	1000000	K1,000
$0K	1000000	$1000K
$#,##0K	1000000	$1,000K
0M	1000000000	1000M
#,##0M	1000000000	1,000M
M0	1000000000	M1000
M#,##0	1000000000	M1,000
$0M	1000000000	$1000M
$#,##0M	1000000000	$1,000M

With the exception of the General format string, you can also preset the number of decimal places to show, using the format_string ~n, where n is the number of decimal places. For example, 1,801,791 can be shown as $1,801,791.00 using the format string $#,##0~2. If you do not want any decimal places, end the format string with ~0.

If your client application uses a different locale, you must replace the Currency ($), Thousands (,) and Decimal (.) symbols in the format_string value for the COGNOS_FORMAT UDA with the corresponding locale symbols in effect for the client application.

If you do not specify the number of decimal places to show, or if the format string does not match one of the predefined values (including locale symbols), the General format string is used by default.

You can apply a different format for each measure. The following illustrates some examples of how you can apply different formatting to different measures:

Measure	Applied Format
Measures (Account dimension)	COGNOS_FORMAT=#,##0
Units	COGNOS_FORMAT=#,##K
Costs	COGNOS_FORMAT=$#,###
Profits	COGNOS_FORMAT=0%

Attributes of a Dimension

You can choose how an attribute of a dimension is represented in a model and all associated packages. An attribute of a dimension can be represented as a separate dimension or as a property (query item) of the dimension with which it is associated. You can set this behavior when creating a package using DB2 OLAP or Essbase data sources.

Steps to Specify Modelling Attributes

1. In Cognos Connection, in the upper-right corner, click **Launch, Cognos Administration**.
2. On the **Configuration** tab, click **Data Source Connections**.
3. Click **More** beside the data source with which you want to create a package.
4. Click **Create a Package**.

   The **New Package Wizard** appears.
5. Enter a name for the package and click **Next**.
6. Select a catalogue and click **Next**.
7. Select a cube and click **Next**.
8. Assign a language specific alias table and click **Next**.
9. Choose a language for the alias table and click **Next**.
10. Choose how to present model attributes. Select **Separate the Dimensions** or **Properties of the dimension they are associated with**. The default selection is **Properties of the dimension they are associated with**.

11. Click **Finish**.

Composite Software

Composite software provides heterogeneous query access by retrieving data from different data sources using a single connection. The data sources are managed by Composite software, and the connections to Composite from Cognos 8 are made using an ODBC system DSN.

For more information about using Composite, see the Composite software documentation. For more information about creating the system DSN and using Composite Information Server with Cognos 8, see the Cognos 8 and Composite Information Server *Getting Started* and the Cognos 8 and Composite Information Server *Readme* on the Composite Information Server installation CD.

Isolation Levels

The isolation level specifies how transactions that modify the database are handled. By default, the default object gateway is used. Not all types of databases support each isolation level. Some database vendors use different names for the isolation levels.

For OLAP data sources, including SAP BW, the isolation level is read-only.

The following isolation levels are in increasing order of isolation:

- Read Uncommitted

  Changes made by other transactions are immediately available to a transaction.

Database type	Equivalent isolation level
Oracle	Not applicable
DB2	Uncommitted read
MS SQL Server	Read uncommitted
Sybase Adaptive Server Enterprise	Read uncommitted
Informix	Dirty read

- Read Committed

  A transaction can access only rows committed by other transactions.

Database type	Equivalent isolation level
Oracle	Read committed

Database type	Equivalent isolation level
DB2	Read stability
MS SQL Server	Read committed
Sybase Adaptive Server Enterprise	Read committed
Informix	Committed read

- Cursor Stability

  Other transactions cannot update the row in which a transaction is positioned.

Database type	Equivalent isolation level
Oracle	Not applicable
DB2	Cursor stability
MS SQL Server	Not applicable
Sybase Adaptive Server Enterprise	Not applicable
Informix	Cursor stability

- Reproducible Read

  Rows selected or updated by a transaction cannot be changed by another transaction until the transaction is complete.

Database type	Equivalent isolation level
Oracle	Not applicable Execute the statement, "SET TRANSACTION READ ONLY," prior to starting a transaction
DB2	Repeatable read
MS SQL Server	Repeatable read
Sybase Adaptive Server Enterprise	Repeatable read
Informix	Repeatable read

- Phantom Protection

  A transaction cannot access rows inserted or deleted since the start of the transaction.

Database type	Equivalent isolation level
Oracle	Not applicable
DB2	Not applicable
MS SQL Server	Not applicable
Sybase Adaptive Server Enterprise	Not applicable
Informix	Not applicable

- Serializable

  A set of transactions executed concurrently produces the same result as if they were performed sequentially.

Database Type	Equivalent isolation level
Oracle	Serializable
DB2	Not applicable
MS SQL Server	Serializable
Sybase Adaptive Server Enterprise	Serializable
Informix	Not applicable

Databases and Sorting Functions

If you use sorting functions such as running-totals in reports, you may need to add a collation sequence to the database connection string to maintain data integrity. Otherwise, when sorting a report that is grouped by one or more columns containing foreign characters, you may get inconsistent results. This is because without the collation sequence information, the default locale is used to sort data, whereas databases may use different collations in their sorting.

To prevent sorting inconsistencies, you must add the correct collation sequence to your database connection string when you create a data source or add a connection.

For example, in Oracle, if you specify the collation sequence as Binary at the database level, you should provide the same collation sequence value in the connection string.

Create a Data Source

When you create a data source, you must provide the information required to connect to the database. This information is provided in the form of a connection string.

You can include authentication information for the database in the data source connection by creating a signon. Users need not enter database authentication information each time the connection is used because the authentication information is encrypted and stored on the server. The signon produced when you create a data source is available to the Everyone group. Later, you can modify who can use the signon or create more signons.

New Data Sources

You can create data sources in the portal or in Framework Manager. Because they are stored on the server, data sources appear in both places, regardless of where they were created. Existing data source connections can be edited only in the portal.

If you are an administrator, you can set up all required data sources before models are created in Framework Manager so that all connections are available in the Framework Manager Import wizard.

Data sources are stored in the Cognos namespace and must have unique names. For example, you cannot use the same name for a data source and a group.

Physical Connections

A data source defines the physical connection to a database. A data source connection specifies the parameters needed to connect to a database, such as the location of the database and the timeout duration.

Note: The schema name in the connection string for an Oracle database is case-sensitive. If the schema name is typed incorrectly, you cannot run queries.

Required permissions

Before creating data sources, you must have write permissions to the folder where you want to save the data source and to the Cognos namespace. You must also have execute permissions for the **Data Source Connections** secured feature.

Connections to Specific Data Sources

If you are creating a connection to one of these data sources, review the pertinent information before continuing:

- Data source security (p. 173)
- Cubes from Cognos products (p. 147)
- XML data source (p. 148)
- Microsoft SQL Server or Microsoft Analysis Server (p. 150)
- ODBC data sources (p. 152)

- DB2 OLAP and Hyperion Essbase data sources (p. 152)
- Composite Software (p. 156)
- Database isolation levels (p. 156)
- Database sorting functions (p. 158)

Tip: If you are creating an Oracle, DB2, or Microsoft SQL Server data source, you can include database commands in the connection information. For more information, see "Use Database Commands" (p. 167).

Recommendation -- Use Network Paths For File-Based Data Sources

If you have a distributed installation with several servers, we recommend that you use network paths for all file based data sources rather than local paths. This will ensure that the data sources can be accessed by the services that require them, regardless of which server requires the data.

When you create a connection to a file-based data source, such as a PowerCube, you enter a path and filename. You can use a local path, such as C:\cubes\Great Outdoors Company.mdc, or a network path, such as *servername*\cubes\Great Outdoors Company.mdc, to point to the file.

In a distributed installation, where report servers are running on different computers, using a local path would require that the file and path be valid on each computer where a report server is running. Alternatively, if you use a network path to point to a file, each report server would point to the same file on the network without having the file available locally. Also, to ensure that the file is always available, we recommend that you store it in a shared directory that can be accessed on your network.

If you have installed Cognos 8 components on UNIX servers, we recommend that you also locate the file-based data source on a UNIX server. You should then use a UNIX path, such as */servername/*cubes/Great Outdoors Company.mdc to access the file.

If you have installed all components on a single computer, you can use local paths, but you must ensure that the services requesting the data have the appropriate access to the data files on the computer.

For Windows distributed installations, we recommend that you use UNC paths to shared directories for any file based data source, such as PowerCubes or XML files.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Data Source Connections**.

   Tip: To remove a data source, select the check box for the data source and click the delete button.
3. Click the new data source button .
4. In the name and description page, type a unique name for the connection and, if you want, a description and screen tip, and then click **Next**.

5. In the connection page, click the type of database to which you want to connect, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.

6. Enter any parameters that make up the connection string, and specify any other settings, such as a signon or a timeout.

   One of the following options may apply depending on the data source to which you are connecting:

   - If you are connecting to a Cognos cube, you must enter the full path and file name for the cube. An example for a local cube is C:\cubes\Great Outdoors Company.mdc. An example for a cube on your network is *servername*\cubes\Great Outdoors Company.mdc. If you leave the **Read cache size** (**MB**) field blank or enter 0, Cognos Connection uses the default value in the ppds_cfg.xml file in the configuration folder.

     You must also select an authentication method. Click **All applicable namespaces**, or click to authenticate using an unsecured PowerCube or to a PowerCube secured against many namespaces. Click **Restrict PowerCube authentication to a single namespace**, and select a namespace from the list. If you are connecting to a password protected PowerCube, click **Cube Password**, and then type the password in the **Password** and **Confirm Password** boxes.

     Note: Select **All applicable namespaces** only if you are migrating Series 7 PowerCubes to Cognos 8 in your development or test environment. This setting can also be used for unsecured PowerCubes that are in a production environment. For more information, see the Transformer *User Guide*.

   - If you are connecting to an ODBC data source, the connection string is generated from the name you enter in the **ODBC data source** box and any signon information. The data source name is an ODBC DSN that has already been set up. You can include additional connection string parameters in the **ODBC connect string** box. These parameters are appended to the generated connection string.

   - If you are connecting to a Microsoft Analysis Services data source, select an option in the **Language** box. If you selected **Microsoft Analysis Services 2005**, you must specify an instance name in the **Named instance** since you can have more than one instance on each server.

   - If you use a Microsoft Active Directory namespace and you want to support single signon with Microsoft SQL Server or Microsoft Analysis Server, select **An External Namespace**, and select the Active Directory namespace. For more information about configuring an Active Directory namespace, see the *Installation and Configuration Guide*.

   - If you selected **Other Type** as the data source type, you will have to build the connection string manually.

   Tip: To test whether parameters are correct, click **Test**. If prompted, type a user ID and password or select a signon, and then click **OK**. If you are testing an ODBC connection to a User DSN, you must be logged on as the creator of the DSN for the test to succeed.

7. Click **Finish**.

- If you created an OLAP data source, a confirmation appears and you are given the option to create a package using your new data source. Click **OK** to return to **Data Source Connections**, or click **Create a Package** and **OK**, and follow the instructions in the new package wizard.

  Note: You can create a package with your new data source at a later date if you do not want to do it now.

- If you selected any other type of data source, the new data source appears in **Data Source Connections** on the **Configuration** tab, and can be selected when using the Import Wizard in Framework Manager.

If you created a signon, you can now modify or add more signons (p. 171). You can also add more connections (p. 162).

Add or Modify a Data Source Connection

You can add new data source connections or edit string parameters for existing connections.

You can also add multiple connections to an existing data source. For example, you want a data source to have two or more connections to the same database that have different properties, such as different timeout values or access permissions.

You can also add connections to a data source that point to different databases, but the databases must contain the same schema.

When you create a data source connection, you can create a signon that the Everyone group can use to access the database. Later, you can modify who can use this signon or create more signons. For example, you can control access to data by setting the permissions for each data source connection. For more information, see "Set Access Permissions for an Entry" (p. 194).

To add or modify a data source connection, you must have access to the required capabilities to administer data sources (p. 199).

If you are creating a connection to one of these data sources, review the pertinent information before continuing:

- Data source security (p. 173)
- Cubes from Cognos products (p. 147)
- XML data source (p. 148)
- Microsoft SQL Server (p. 149) or Microsoft Analysis Server (p. 150)
- ODBC data sources (p. 152)
- DB2 OLAP and Hyperion Essbase data sources (p. 152)
- Composite Software (p. 156)
- Database isolation levels (p. 156)
- Database sorting functions (p. 158)

If you are creating an Oracle, DB2, or Microsoft SQL Server data source, you can include database commands in the connection information. For more information, see "Use Database Commands" (p. 167).

If you select Microsoft Analysis Services 2005 as the connection type, you can have more than one instance on the same server.

Steps to Create a Connection

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Data Source Connections**.
3. Click the data source for which you want to add a new connection.

   Tip: To remove a data source connection, select its check box and click the delete button.
4. Click the new connection button .
5. In the name and description page, type a unique name for the connection and, if you want, a description and screen tip, and then click **Next**.
6. In the connection page, click the type of database to which you want to connect, select an isolation level, and then click **Next**.

   The connection string page for the selected database appears.
7. Enter any parameters that make up the connection string, and specify any other settings, such as a signon or a timeout.

   One of the following options may apply depending on the data source to which you are connecting:

   - If you are connecting to a Cognos cube, you must enter the full path and file name for the cube. An example for a local cube is C:\cubes\Great Outdoors Company.mdc. An example for a cube on your network is *servername*\cubes\Great Outdoors Company.mdc. If you leave the **Read cache size** (**MB**) field blank or enter 0, Cognos Connection uses the default value in the ppds_cfg.xml file in the configuration folder.

     You must also select an authentication method. Click **All applicable namespaces**, or click to authenticate using an unsecured PowerCube or to a PowerCube secured against many namespaces. Click **Restrict PowerCube authentication to a single namespace**, and select a namespace from the list. If you are connecting to a password protected PowerCube, click **Cube Password**, and then type the password in the **Password** and **Confirm Password** boxes.

     Note: Select **All applicable namespaces** only if you are migrating Series 7 PowerCubes to Cognos 8 in your development or test environment. This setting can also be used for unsecured PowerCubes that are in a production environment. For more information, see the Transformer *User Guide*.

   - If you are connecting to an ODBC data source, the connection string is generated from the name you enter in the **ODBC data source** box and any signon information. The data source name is an ODBC DSN that has already been set up. You can include additional connection

string parameters in the **ODBC connect string** box. These parameters are appended to the generated connection string.

- If you are connecting to a Microsoft Analysis Services data source, select an option in the **Language** box. If you selected **Microsoft Analysis Services 2005**, you must specify an instance name in the **Named instance** since you can have more than one instance on each server.
- If you use a Microsoft Active Directory namespace and you want to support single signon with Microsoft SQL Server or Microsoft Analysis Server, select **An External Namespace**, and select the Active Directory namespace. For more information about configuring an Active Directory namespace, see the *Installation and Configuration Guide*.
- If you selected **Other Type** as the data source type, you will have to build the connection string manually.

Tip: To test whether parameters are correct, click **Test**. If prompted, type a user ID and password or select a signon, and then click **OK**. If you are testing an ODBC connection to a User DSN, you must be logged on as the creator of the DSN for the test to succeed.

8. Click **Finish**.
   - If you created an OLAP data source, a confirmation appears and you are given the option to create a package using your new data source. Click **OK** to return to **Data Source Connections**, or click **Create a Package** and **OK**, and follow the instructions in the new package wizard.

     Note: You can create a package with your new data source at a later date if you do not want to do it now.
   - If you selected any other type of data source, the new data source appears in **Data Source Connections** on the **Configuration** tab, and can be selected when using the Import Wizard in Framework Manager.

If you created a signon, you can now modify the signon or add more signons.

Steps to Modify a Connection

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Data Source Connections**.
3. Click the data source for which you want to modify the connection.
4. Click the set properties button for the connection you want to modify.
5. Click the **Connection** tab.
6. Change the data source type by clicking an option in the **Type** box.
7. Click the edit icon to modify the connection string. Select any parameters that make up the database connection string, select whether to create a signon, and click **OK**.

8. Click **OK**.

Update a PowerCube Connection

If a PowerCube has been rebuilt, you can update the connection information without affecting current users. To do this, you must first update the connection information to the rebuilt PowerCube, and then refresh the report servers to use the rebuilt PowerCube for new connections.

The updated PowerCube will be used for all new sessions referencing that data source. Any user that has an active session against the data source may have to re-open their session. Old PowerCubes can be removed only after all sessions using that PowerCube have ended.

When you rebuild the cube, we recommend that you use a new name for the PowerCube, such as including the current date in the new name. You can then store the rebuilt PowerCube in the same location as the old PowerCube. For convenience, Cognos provides the sample script cubeswap.bat or cubeswap.sh that is located in the *c8_location*/webapps/utilities/cubeSwap directory. You can get more information about the script syntax by running the script without any parameters.

Tip: You can automate this task using the Cognos 8 SDK to hot swap PowerCubes. For more information, see the SDK *Developer Guide*.

For information about refreshing report service connections, see (p. 96).

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Data Source Connections**.
3. Click the data source representing the cube you want to update.
4. Click the set properties button for the connection you want to update.
5. Click the **Connection** tab.
6. Click the edit button for the connection string.
7. Change the file path and name to point to the rebuilt cube.

   Tip: To test whether parameters are correct, click **Test**. If prompted, type a user ID and password or select a signon, and then click **OK**.
8. Click **Close**, and **Close** again, then click **OK**, and **OK** again to return to the data sources page.
9. In the left pane, click **Dispatchers and Services**.
10. Click the refresh report service connections button .

    Any new connections to the PowerCube will use the updated cube.

Manage Data Source Connections

The report server computer uses the data source connections to access the query databases. You can manage data source connections by modifying the following variables.

PoolSize

Set the maximum number of data source connections available to the report server by modifying the PoolSize variable.

Timeout

Set the duration for retaining connections by modifying the Timeout variable. Connections are examined once per minute and any connection that has been inactive longer than the timeout value is removed. The default timeout value is 900 seconds.

Reusable Data Connections

Data source connections are reusable only when the database credentials of the connection match those of the new request. Inactive data source connections can be claimed by a new request. This occurs when the maximum number of connections has been reached and none of the inactive connections can be used by the new request. In this case, the oldest inactive connection is terminated and a new connection is created.

When the maximum number of connections is reached, and all are active, then additional requests fail. The server must be configured to ensure that the concurrent report requests do not exceed the request pool size.

For more information about report service requests, see "Set the Maximum Number of Processes and Connections" (p. 125).

Steps

1. On each computer where Cognos 8 is installed, open the *c8_location*/configuration/CQEConfig.xml.sample file in a text editor.

   Ensure that your editor supports saving files in UTF-8 format.

2. Find the **Timeout** and **PoolSize** parameter and edit them as follows:

```
<?xml version="1.0" encoding="UTF-8"?>
<configuration company="Cognos" version="#.#"
rendition="###">
  <component name="CQE">
    <section name="DBConnectionPool">
      <!-- Description: Database connection timeout.
       Default is 900 seconds (15minutes) -->
      <entry name="Timeout" value="number_of_seconds"/>
      <!-- -->
      <!-- Description: Database connection pool size. -->
      <!-- Maximum number of connections managed by the report
           server. Default=50 -->
      <entry name="PoolSize" value="number_of_connections"/>
    </section>
  </component>
</configuration>
```

3. Save the file as CQEConfig.xml to the *c8_location*/configuration directory.
4. Using Cognos Configuration, stop and then restart the services.

   For information about stopping services, see the Cognos 8 *Installation and Configuration Guide*.

Use Database Commands

Use the connection wizard to specify database commands that run when an Oracle connection or session is opened or closed, or when a DB2 or Microsoft SQL Server session is opened.

For example, you can use a database command to set the language when you open a connection to an Oracle database, or to set up proxy connections (p. 169) or virtual private databases (p. 171).

For DB2 and Microsoft SQL, you can use commands to run native SQL commands when you open a session, such as running a stored procedure.

Database commands are included in command blocks which are formatted using XML.

Example -- An Open Connection Command Block

The following sets French as the language for an Oracle connection:

```
<commandBlock>
  <commands>
   <sqlCommand>
    <sql>ALTER SESSION SET NLS_LANGUAGE = FRENCH</sql>
   </sqlCommand>
  </commands>
</commandBlock>
```

Example -- A Close Connection Command Block

The following re-sets the language to English before disconnecting from an Oracle database:

```
<commandBlock>
  <commands>
   <sqlCommand>
    <sql>ALTER SESSION SET NLS_LANGUAGE = ENGLISH</sql>
   </sqlCommand>
  </commands>
</commandBlock>
```

Notes

- You cannot test the command blocks using the **Test the connection** link on the connection string page. If you have SDK installed, you can ensure that your XML code validates against the schema file named *c8_location*/webapps/p2pd/WEB-INF/classes/DataSource.xsd
- The command structure is the same for Oracle, DB2, and Microsoft SQL Server. However, the specific database commands can vary depending on which database you are using. For example, the above examples are Oracle commands.
- Commands for DB2 and Microsoft SQL server must be in native SQL, and must be included in an `<sqlCommand>` tag, as used in the examples above.

Add Command Blocks While Creating a Data Source

You add command blocks using the connection wizard.

By default, connections acquire properties from the parent data source. You can modify this later.

Steps

1. Complete steps 1 to 6 to create a data source (p. 159), choosing Oracle, DB2, or Microsoft SQL Server as the data source type.
2. Click **Next**.
3. In the specify commands page, click **Set** next to the command string that you want to specify.
4. In the set command page, add an XML command block, and click **OK**.

   Note: If you are using DB2 or Microsoft SQL Server, you can only add commands block for opening a session.
5. Continue adding command blocks, as required.
6. Click **Finish**.

Add or Modify Command Blocks for a Connection

Connections acquire properties from their parent data source. If you have added a command block for a data source, then that command block will be available to Oracle, DB2, or Microsoft SQL Server connections in that data source.

You can change a command block for a specific connection, and you can remove the command block if you do not want it used for the connection.

Steps

1. Complete steps 1 to 7 to create a connection (p. 163) or to modify a connection (p. 164), choosing Oracle, DB2, or Microsoft SQL Server as the data source type.
2. Click **Next**.
3. Click **Set** or **Edit** next to the command block that you want to modify.

   The **Acquired** column shows **Yes** or **No** to indicate whether the connection acquires properties from its parent data source.
4. In the set command page, add or modify the XML code command block, and click **OK**.

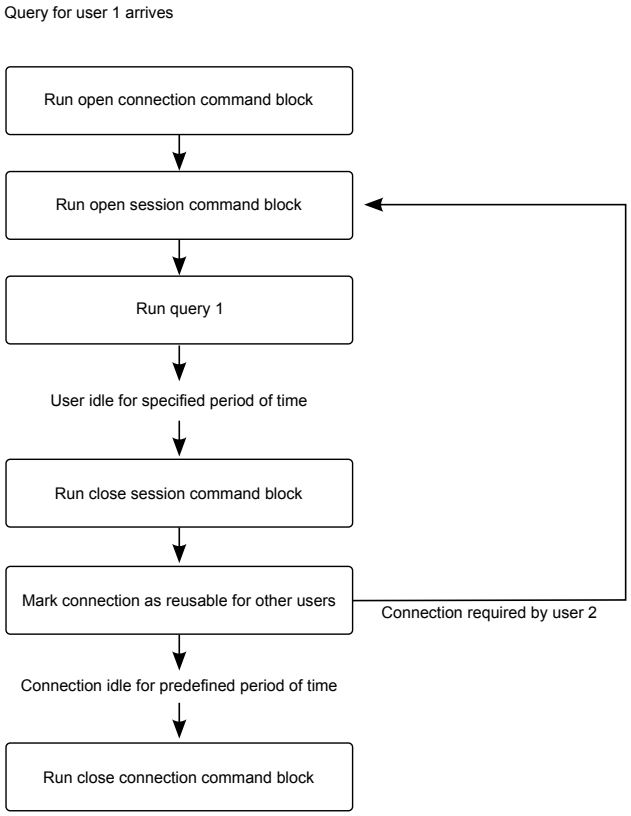
   Tip: You can reset command blocks by selecting the check box next to the connections clicking **Reset to parent value** or **Clear**.

   Note: If you are using DB2 or Microsoft SQL Server, you can only add commands block for opening a session.
5. Continue adding or modifying command blocks, as required.

6. Click **Finish.**

Command Block Examples

The following diagram shows an example of the interaction between the four available command blocks, assuming that a connection to the database does not exist.


Query for user 1 arrives
Run open connection command block
Run open session command block
Run query 1
User idle for specified period of time
Run close session command block
Mark connection as reusable for other users
Connection required by user 2
Connection idle for predefined period of time
Run close connection command block

Example -- Using Command Blocks for Proxy Connections for Oracle

If you are using Oracle proxy connections, you can use an existing idle connection with signons for proxy connections. The physical connection can be used by more than one user. Because the proxy connections run on top of the existing physical connection, fewer physical connections are required.

To create a proxy connection, you create open session command blocks in XML.

Only one proxy connection session can exist for each physical connection. If the connection fails while a proxy connection is being created, the handle for the application server session is reassociated with the service context handle. All subsequent requests use the Oracle session handle that was created during connection time until a new proxy connection is created for the user.

The following is a simple example of an open session command block that creates a proxy connection for User1. Note that the sessionStartCommand is an Oracle-specific command that triggers the start of an OCI_session.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>PROXY_USER1</value>
        </argument>
      </arguments>
    </sessionStartCommand>
  </commands>
</commandBlock>
```

Another example is a macro that can be substituted if authentication userNames are equivalent to the proxy userid.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>#$account.personalInfo.userName#
          </value>
        </argument>
      </arguments>
    </sessionStartCommand>
  </commands>
</commandBlock>
```

The following is a simple example of a close session command block for a proxy session. The current proxy connection is terminated. Note that sessionEndCommand is an Oracle-specific command that ends an OCI_session.

```
<commandBlock>
  <commands>
    <sessionEndCommand>
      <arguments/>
    </sessionEndCommand>
  </commands>
</commandBlock>
```

Notes

- If no sessionEndCommand is supplied, the proxy connection is terminated with a disconnection from the database.
- Command blocks for Oracle proxy connections and virtual private databases at the data source level apply to all connections to that data source.

  When you add a data source, by default, connections acquire properties from the parent data source. You can modify this later.

Example -- Using Command Blocks for Virtual Private Databases for Oracle

Typically, Oracle uses signons to determine the database information that users can access. A virtual private database determines which users can access which information, without further signon information required.

You create a command block for the connection using macros that are substituted at run time for the logged on user. The macros identify the user so that the user need not re-enter signon information.

If all users who access the database are defined as database users and user accounts are used for connections, you can set up the context automatically when the connection is established. For example, the macro can be substituted for the userName.

The XML command block stores a series of commands that are run in the stated sequence. This may include the commands that are described in "Schema for Data Source Commands" (p. 675).

The following example shows an XML command block for a virtual private database.

This command block sets up a context (virtual private database) within the connection based on the passed parameter. The passed parameter is retrieved from the environment, which is related to the user's logon at the portal level. These variables can be modified in the configuration tool. Their values are user specific and obtained using the security control mechanism (CAM).

```
<commandBlock>
  <commands>
    <sqlCommand>
      <sql>BEGIN PKG_COUNTRY_CONTEXT.SP_SET_COUNTRY1
       (#$account.parameters.var1#);
END;</sql>
    </sqlCommand>
  </commands>
</commandBlock>
```

This example shows account parameter substitution. You must specify account information as custom properties. For information about session properties, see the Framework Manager *User Guide*.

Note: Command blocks for Oracle proxy connections and virtual private databases at the data source level apply to all connections to that data source.

Create or Modify a Data Source Signon

You add signons to existing data source connections so that users don't have to enter database credentials when they run reports. When you create a signon, you specify the users and groups that can access the signon. The user ID and password that make up the signon must already be defined in the database.

For information about creating groups, see "Users, Groups, and Roles" (p. 185).

You can modify an existing signon if the credentials to log on to the database change or if you want to change who can use the signon.

Steps to Create a Signon

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.

2. On the **Configuration** tab, click **Data Source Connections**.
3. Click the data source and then click the connection to which you want to add a new signon.
4. Click the new signon button .
5. In the name and description page, type a unique name for the data source signon and, if you want, a description and screen tip, and then click **Next**.
6. Type the User ID and Password to connect to the database and click **Next**.

   The **Select the users** page appears.
7. Add users and groups that can use the signon and click **Finish**.

   The new data source signon appears under the connection.

Steps to Modify a Signon

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Data Source Connections**.
3. Click the data source and then click the connection for which you want to modify the signon.

   Tip: To remove a signon, select its check box and click the delete button.
4. Click the set properties button for the signon you want to modify.
5. Click the **Signon** tab.

   A list of users and groups that can use the signon appears.
6. If you want to change the user ID and password that make up the signon click **Edit the signon**, type the new credentials, and click **OK**.
7. If you want to add users or groups to the signon list, click **Add**, and choose how to select users and groups:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     namespace/group_name;namespace/role_name;namespace/user_name;

     Here is an example:

     Cognos/Authors;LDAP/scarter;
8. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

9. Click the right arrow button to add the entries to the **Selected entries** box.
10. If you want to remove users or groups, select the check box next to the entries you want to remove and then click **Remove**.
11. Click **OK**.

Data Source Security

You can define security for data sources using Cognos 8 authentication or data source-specific security. Defining Cognos 8 authentication for a data source does not override any security that exists for the data source itself.

Depending on the data source, one or more of the following authentication methods are available:

- no authentication

  Cognos 8 logs on to the data source without providing any signon credentials.

- Cognos 8 service credentials

  Cognos 8 logs on to the data source using the logon specified for the Cognos 8 service. Users do not require individual database signons. For production environments, however, individual database signons are generally more appropriate.

- external namespace

  Cognos 8 logs on to the data source with the same credentials used to authenticate to the specified authentication namespace. The namespace must be active, users must be logged on prior to accessing the data source, and the authentication credentials used for the namespace must be relevant for the data source authentication.

All data sources also support data source signons defined for the Everyone group or for individual users, groups, or roles (p. 185). If the data source requires a data source signon, but you do not have access to a signon for this data source, you will be prompted each time you access the data source.

Cognos 8 also respects any security defined for the data source. For example, for Cognos cubes, the security may be set at the cube level. For Microsoft Analysis Server data sources, the security may be set using cube roles.

Chapter 7: Back Up Data

We recommend that you regularly back up your Cognos 8 data and configuration settings, and your Framework Manager projects and models. This prevents the loss of your data should your computer be damaged or stolen. After your computer is operational, you can restore your data.

Because backing up consumes system resources, if Cognos 8 is running while the database is backed up, its performance will be affected.

If you changed the location of the encryption and signing key settings from the default location, ensure that you back up the directory that contains them. Also, if the key stores are secured with passwords, ensure that you retain these passwords.

Data you back up is meant to be restored to the same computer. For information about moving data from one computer to another, see "Deployment" (p. 277).

For information about backing up data before you upgrade your software, see the upgrade topic in the Cognos 8 *Installation and Configuration Guide*.

If you use a source control system to store your Framework Manager projects, you do not need to back up your projects.

If you customized any information in Cognos Configuration or in the content store, ensure that it is backed up correctly.

Steps

1. Back up the content store.

   For more information, see your database documentation.

2. Copy the *c8_location*/configuration directory to the backup location.

   This directory contains the configuration settings.

If you must ever restore the configuration settings, you can copy the backed-up directory to the correct location.

For information about restoring the content store, see your database documentation.

Step to Back Up Framework Manager Projects and Models

- Copy the Framework Manager project directory and its subdirectories to the backup location.

  By default, the projects and models are located in My Documents/My Projects.

If you must ever restore the Framework Manager projects and models, you can copy the backed-up directories to the correct location.

Chapter 8: Data Movement Entries

Data Manager is used to create and manage data warehouses and data repositories for reporting, analysis, and performance analysis. It can be used to populate data warehouse fact tables and dimension tables by extracting, merging, and transforming the operational data from multiple sources, before delivering it to coordinated data marts. Data movement tasks, such as Builds and JobStreams, are created in Data Manager Designer and can be published to Cognos 8 for integrated execution. For more information, see the Data Manager *User Guide*.

After a data movement entry is published to Cognos 8, use Cognos Connection to do the following:

- run the entry (p. 177)
- change default properties (p. 178).

You can schedule data movement entries to run at a specified time or based on a trigger, such as a database refresh or an email (p. 269). If you want to use an agent (p. 351) for a data movement entry, include the entry as part of a job (p. 271), and then include the job in an agent.

You can view the run histories for data movement entries (p. 264)You can rerun failed data movement entries. See "Rerun a Failed Entry Task" (p. 266).

Run a Data Movement Entry

You can manually run a data movement entry at any time to perform the Data Manager tasks that it includes.

You can also schedule data movement entries. For more information, see "Schedule Management" (p. 269).

You must have the required permissions for the data movement entry. See "Secured Functions and Features" (p. 199).

Steps

1. In Cognos Connection, click the run with options button on the actions toolbar next to the data movement entry you want to run.
2. Under **Time**, select **Now** to run the data movement entry now, or **Later** to specify a later date and time.
3. Click **Run**.

   The confirmation page appears.
4. Click **OK**.

Change Default Data Movement Entry Properties

You can change the defaults that are set for data movement entries in Data Manager, such as the owner and the language.

You can run a data movement entry, schedule a data movement entry, and set the number of occurrences and duration of the run history. For more information, see "Schedule Management" (p. 269). You can disable the entry (p. 226).

You can view the location of the entry in the portal and its ID (p. 217).

You must have the required permissions for the data movement entry. See "Secured Functions and Features" (p. 199).

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar next to the data movement entry that you want to run.
2. Click the **General** tab.
3. If you want to make yourself the owner of the entry, click **Make me the owner**.
4. If you want to set a contact or an email address for the entry, click **Set the contact** and then click either **Select the contact** or **Enter an email address**.
5. If you want to change the icon associated with the entry, click **Edit**, specify the new icon for the entry, and click **OK**.
6. If you want to select a different language, select from the **Language** menu.
7. If you want, enter or change the **Name**, **Description**, and **Screen tip** for the data movement entry.
8. If you want to set **Run history** options, click **Number of occurrences**, and set the number of run repetitions, or click **Duration**, and set the number of days to run the entry.
9. Click **OK**.

   The next time the data movement entry runs, it uses these properties instead of the original defaults.

Chapter 9: Security Model

Cognos 8 security is designed to meet the need for security in various situations. You can use it in everything from a proof of concept application where security is rarely enabled to a large scale enterprise deployment.

The security model can be easily integrated with the existing security infrastructure in your organization. It is built on top of one or more third-party authentication providers. You use the providers to define and maintain users, groups, and roles, and to control the authentication process.

Each authentication provider known to Cognos 8 is referred to as a namespace .

In addition to the namespaces that represent the third-party authentication providers, Cognos 8 has a built-in namespace called Cognos. The Cognos namespace enhances your organization security policies and deployment ability of applications.

Security in Cognos 8 is optional. If security is not enabled it means that no third-party authentication providers are configured, and therefore all user access is anonymous. Typically, anonymous users have limited, read-only access.

Authentication Providers

User authentication in Cognos 8 is managed by third-party authentication providers. Authentication providers define users, groups, and roles used for authentication. User names, IDs, passwords, regional settings, personal preferences are some examples of information stored in the providers. If you set up authentication for Cognos 8, users must provide valid credentials, such as user ID and password, at logon time. In Cognos 8 environment, authentication providers are also referred to as namespaces, and they are represented by namespace entries in the user interface.

Cognos 8 does not replicate the users, groups, and roles defined in your authentication provider. However, you can reference them in Cognos 8 when you set access permissions to reports and other content. They can also become members of Cognos groups and roles.

The following authentication providers are supported in this release:

- Active Directory Server
- Cognos Series 7
- eTrust SiteMinder
- LDAP
- NTLM
- SAP

You configure authentication providers using Cognos Configuration. For more information, see the *Installation and Configuration Guide*.

Multiple Namespaces

If multiple namespaces are configured for your system, at the start of a session you must select one namespace that you want to use. However, this does not prevent you from logging on to other namespaces later in the session. For example, if you set access permissions, you may want to reference entries from different namespaces. To log on to a different namespace, you do not have to log out of the namespace you are currently using. You can be logged on to multiple namespaces simultaneously.

Your primary logon is the namespace and the credentials that you use to log on at the beginning of the session. The namespaces that you log on to later in the session and the credentials that you use become your secondary logons.

When you delete one of the namespaces, you can log on using another namespace. If you delete all namespaces except for the Cognos namespace, you are not prompted to log on. If anonymous access is enabled, you are automatically logged on as an anonymous user. If anonymous access is not enabled, you cannot access the Cognos Connection logon page. In this situation, use Cognos Configuration to enable anonymous access.

Deleting or Restoring Unconfigured Namespaces

You can preserve namespaces and all their contents in the content store even if they are no longer configured for use in Cognos 8. When a namespace is not configured, it is listed as inactive in the directory tool.

An inactive namespace is one that was configured, but later deleted in Cognos Configuration. The namespace can be deleted from the content store by members of the System Administrators role. You cannot log on to an inactive namespace.

If a new version of Cognos 8 detects a previously configured namespace that is no longer used, the namespace appears in the directory tool as inactive. You can configure the namespace again if you still require the data. If the namespace is not required, you can delete it.

When you delete a namespace, you also delete all entries in My Folders that are associated with that namespace, and their contents.

An active namespace cannot be deleted, but can be updated.

To recreate a namespace in Cognos Configuration, you must use the original ID of the namespace. For information about configuring and recreating namespaces, see the *Installation and Configuration Guide*.

Delete an Inactive Namespace

If a namespace was removed from Cognos Configuration and is no longer required, a member of the System Administrators role can delete it permanently in the directory tool. Deleting a namespace also deletes all the entries in My Folders that are associated with the namespace.

To access the directory administration tool, you must have execute permissions for the directory secured feature and traverse permissions for the administration secured function.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch, Cognos Administration**.
2. On the **Security** tab, click **Users, Groups, and Roles**.

   If the namespace you want to delete does not have a check mark in the **Active** column, it is inactive and can be deleted.
3. In the **Actions** column, click the delete button.

   If the namespace is active, the delete button is not available.

The namespace is permanently deleted. To use the namespace again in Cognos 8, you must add it using Cognos Configuration.

Authorization

Authorization is the process of granting or denying access to data, and specifying the actions that can be performed on that data, based on a user identity.

Cognos 8 authorization assigns permissions to users, groups, and roles that allow them to perform actions, such as read or write, on content store objects, such as folders and reports. The content store can be viewed as a hierarchy of data objects. These objects include not only folders and reports, but packages for report creation, directories, and servers.

When Cognos 8 administrators distribute reports to users, they can set up folders in which reports and other objects can be stored. They can then secure those folders so that only authorized personnel can view, change, or perform other tasks using the folder contents.

For information about setting access permissions to the Cognos 8 entries, see "Access Permissions" (p. 191). For information about the Content Manager hierarchy of objects and the initial access permissions, see "Initial Access Permissions " (p. 625).

Cognos Namespace

The Cognos namespace is the Cognos 8 built-in namespace. It contains the Cognos objects, such as groups, roles, data sources, distribution lists, and contacts.

During the content store initialization, built-in and predefined security entries are created in this namespace (p. 207). You must modify the initial security settings for those entries and for the Cognos namespace immediately after installing and configuring Cognos 8 (p. 210).

You can rename the Cognos namespace using Cognos Configuration, but you cannot delete it. The namespace is always active.

When you set security in Cognos 8, you may want to use the Cognos namespace to create groups and roles that are specific to Cognos 8. In this namespace, you can also create security policies that

indirectly reference the third-party security entries so that Cognos 8 can be more easily deployed from one installation to another (p. 278).

The Cognos namespace always exists in Cognos 8, but the use of Cognos groups and roles it contains is optional. The groups and roles created in the Cognos namespace repackage the users, groups, and roles existing in the authentication providers to optimize their use in the Cognos 8 environment. For example, in the Cognos namespace, you can create a group called HR Managers and add to it specific users and groups from your corporate IT and HR organizations defined in your authentication provider. Later, you can set access permissions for the HR Managers group to entries in Cognos 8.

Cognos Application Firewall

Cognos Application Firewall (CAF) is a security tool used to supplement the existing Cognos 8 security infrastructure at the application level. CAF analyzes, modifies, and validates HTTP and XML requests before the gateways or dispatchers process them, and before they are sent to the requesting client or service. It acts as a smart proxy for the Cognos product gateways and dispatchers, and prevents the Cognos 8 components from malicious data. The most common forms of malicious data are buffer overflows and cross-site scripting (XSS) attacks, either through script injection in valid pages or redirection to other Web sites.

Cognos Application Firewall (CAF) provides Cognos 8 components with security features that include data validation and protection (p. 182), logging and monitoring (p. 183), and output protection.

CAF is enabled by default, and should not be disabled.

You can update CAF independently of the other Cognos 8 components.

For more information about CAF, see the *Installation and Configuration Guide*, and the *Architecture and Deployment Guide*.

Data Validation and Protection

Validation of input data ensures that the data is in the expected format, based on a set of pre-defined variable rules. HTML variables, XML data, cookie values, and parameters are checked against this set of rules.

CAF performs positive validation of parameters instead of only searching for known script injection tags or common SQL injection signatures. Each parameter is validated against a rule that expects a certain data type in a certain format. If the data does not match the CAF rule, it is rejected.

To provide even stronger validation, CAF matches regular expression patterns to protect data inputs that use complicated formats.

Valid Domain or Host List

A common type of attack is to trick a user into going to a harmful site by modifying the form parameters. The back button and error URL features of a product provide a prime target for this type of attacks.

CAF limits the list of hosts and domains that a back URL can access. CAF can be configured with a list of host names, including port numbers and domains. If a back URL contains a host or a domain that does not appear in the list, the request is rejected. By default, the host name of the dispatcher is added to the list. You can configure the list using Cognos Configuration.

For more information, see the *Installation and Configuration Guide*.

Logging and Monitoring

Cognos Application Firewall (CAF) can monitor and log all access to Cognos gateways and dispatchers. Use logging to track possible attacks or misuse of your Cognos applications.

You can configure CAF to log access to a specific file or to use Cognos log application (IPF) logging. If logging is enabled, all requests that fail validation by CAF are logged.

For more information, see the *Installation and Configuration Guide*.

Tip: You can use the Web server request log to obtain detailed information about the IP address of the source client in a suspected attack.

Cross-Site Scripting (XSS) Encoding

Many customers use third party applications, such as eTrust SiteMinder, to check for cross-site scripting vulnerabilities. These products block HTTP get requests that contain specific characters.

CAF encodes characters in Cascading Style Sheets (CSS) with URLs to prevent third-party cross-site scripting tools from blocking the characters.

The CAF XSS encoding feature applies only to customers who use the Cognos Connection portal.

CAF XSS encoding is disabled by default. To enable this feature, use Cognos Configuration.

For more information, see the *Installation and Configuration Guide*.

Filtering of Error Messages

Some error messages may contain sensitive information, such as server names. By default, error message details in Cognos 8 are routed to IPF log files, and the secure error message option is enabled. The information presented to users indicates only the occurrence of an error, without any details.

You can specify who can retrieve full error details that may include sensitive information by changing the **Detailed Errors** capability in Cognos 8 administration. Typically, this capability is assigned to directory administrators, but you can assign it to other users as well. For more information, see "Securing Functions and Features" (p. 199).

For information about retrieving full error details, see "View Full Details for Secure Error Messages" (p. 80).

Parameter Signing

Parameter signing protects parameter values against tampering when they are sent to a Web browser. CAF can sign parameters or specific parts of data. Signing is used only in specific situations. It is enabled when CAF is enabled.

Chapter 10: Users, Groups, and Roles

Users, groups, and roles are created for authentication and authorization purposes.

In Cognos 8, you can use users, groups, and roles created in third-party authentication providers, and groups and roles created in Cognos 8. The groups and roles created in Cognos 8 are referred to as Cognos groups and Cognos roles.

Users

A user entry is created and maintained in a third-party authentication provider to uniquely identify a human or a computer account. You cannot create user entries in Cognos 8.

Information about users, such as first and last names, passwords, IDs, locales, and email addresses, is stored in the providers. However, this may not be all the information required by Cognos 8. For example, it does not specify the location of the users' personal folders, or format preferences for viewing reports. This additional information about users is stored in Cognos 8, but when addressed in Cognos 8, the information appears as part of the external namespace.

Series 7 Users

If you configured the Cognos Series 7 authentication provider (p. 179), a user from that namespace must belong to at least one Access Manager user class for the user to be usable in Cognos 8.

For example, if you create a new user in Series 7 Access Manager and assign the user to a user class but then remove the user from that user class, you cannot log on as that user in Cognos 8.

Deleting and Recreating Users

For Series 7 and NTLM authentication providers, you cannot maintain associated properties and items when you delete and re-create a user. For example, if a user creates an object in **My Folders**, and then that user is deleted, the **My Folders** objects are no longer associated with that user. If a user with the same name is re-created, the objects are not reinstated.

If you use an LDAP server, the stability of **My Folders** objects depends on how you use the IDs. If the configuration of the LDAP provider uses the default attribute of dn for the Unique identifier parameter, a reinstated user with the same name keeps the **My Folders** objects of the original user. If you change the Unique identifier parameter to a unique attribute set by the LDAP server, for example, nsuniqueid for Sun Java System, the association of **My Folders** objects is lost for a deleted user and a new **My Folders** will be created for a user of the same name.

You can delete, copy, and change user profiles. For more information, see "Managing User Profiles" (p. 309).

User Locales

A locale specifies linguistic information and cultural conventions for character type, collation, format of date and time, currency unit, and messages. You can specify locales for individual products, content, servers, authors, and users in Cognos 8.

User locale refers to the product and content locales for each Cognos 8 user. Requests from users arrive with an associated locale. Cognos 8 must determine the language and locale preferences of users and enforce an appropriate response locale when you distribute reports in different languages.

A user locale specifies the default settings that a user wants to use for formatting dates, times, currency, and numbers. Cognos 8 uses this information to present data to the user.

Cognos 8 obtains a value for user locale by checking these sources, in the order listed:

- user preference settings

  If the user sets the user preference settings in Cognos Connection, Cognos 8 uses these settings for the user's product and content locale and for default formatting options. The user preference settings override the values obtained from the authentication provider.

- authentication provider

  If the authentication provider has locale settings that are configured, Cognos 8 uses these values for the user's product and content locale.

- browser setting

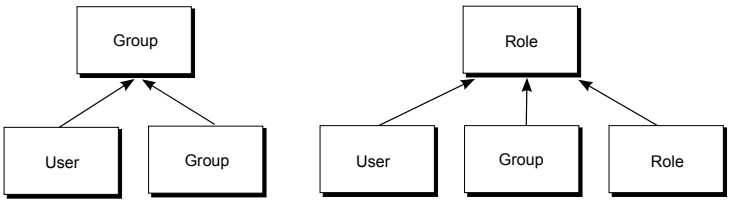
  Anonymous and guest users cannot set user preference settings. For these users, Cognos 8 obtains a user locale from the browser stored on the user's computer.

Groups and Roles

Groups and roles represent collections of users that perform similar functions, or have a similar status in an organization. Examples of groups are Employees, Developers, or Sales Personnel. Members of groups can be users and other groups. When users log on, they cannot select a group they want to use for a session. They always log on with all the permissions associated with the groups to which they belong.

Roles in Cognos 8 have a similar function as groups. Members of roles can be users, groups, and other roles.

The following diagram shows the structure of groups and roles.



Users can become members of groups and roles defined in third-party authentication providers, and groups and roles defined in Cognos 8. A user can belong to one or more groups or roles. If users are members of more than one group, their access permissions are merged.

You create Cognos groups and roles when

- you cannot create groups or roles in your authentication provider
- groups or roles are required that span multiple namespaces
- portable groups and roles are required that can be deployed

  In this case, it is best to populate groups and roles in the third-party provider, and then add those groups and roles to the Cognos groups and roles to which they belong. Otherwise, you may have trouble managing large lists of users in a group in the Cognos namespace.
- you want to address specific needs of Cognos 8 administration
- you want to avoid cluttering your organization security systems with information used only in Cognos 8

Series 7 Roles

If you have configured the Cognos Series 7 authentication provider (p. 179), user collections known as user classes in Series 7 appear as roles in Cognos 8. You can access Series 7 and Cognos 8 using a single logon. If you start your session by logging on to Series 7, and then access Cognos 8, you automatically assume the roles that were in effect for you in Series 7 when you first logged on. You cannot assume different Series 7 roles.

Users can assume different roles in Series 7 after they access Cognos 8.

Roles Used to Run Reports and Jobs

The roles used to run reports and jobs are associated with the users who run the reports interactively (p. 318), who are the report owners, and whose credentials are used to run scheduled reports and jobs (p. 269). Depending on the options selected to run reports, different roles can be assumed by the process.

- When a report runs that has the run as the owner option selected, the process assumes all the roles associated with the report owner (p. 193).
- When a scheduled report or job runs, the session assumes all the roles associated with the user whose credentials were used to process the request (p. 196).

Distribution Lists as Members of Groups and Roles

In some namespaces, such as Microsoft Active Directory, a distribution list may appear on the **Members** tab of the **Set properties** page for a group or role. However, you cannot add distribution lists to a group or role membership, and you cannot use them to set access permissions for entries in the Cognos 8 user interface.

You can add a Cognos distribution list to a Cognos group or role membership using the Software Development Kit (SDK). However, the SDK cannot be used to add an Active Directory distribution list to an Active Directory group. The Active Directory management tools must be used to do this.

Cognos Controller Groups and Roles

If you are configuring security for Cognos 8 Cognos Controller, you use Cognos Controller groups and Cognos Controller roles. For information about using these groups and roles to configure security, see the Cognos Controller *Installation and Configuration Guide*.

Create a Cognos Group or Role

The members of Cognos groups can be users or other groups. The members of Cognos roles can be users, groups, or other roles. You can add entries from multiple namespaces, created both in the authentication providers and in Cognos 8, as members of Cognos groups. You can also create empty groups that do not have any members.

If you plan to create groups or roles that reference entries from multiple namespaces, you must log on to each of those namespaces before you start your task. Otherwise, you will not have full administrative rights for the entries you want to reference.

To access the directory administration tool, you must have execute permissions for the directory secured feature and traverse permission for the administration secured function (p. 627).

We recommend that you use the Cognos groups and roles when you set up access permissions to entries in Cognos 8 because it simplifies the process of deployment (p. 278).

When you delete a Cognos group or role, users' access permissions based on it are no longer active. You cannot restore access permissions by creating a group or role with the same name.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Security** tab, click **Users, Groups, and Roles**.
3. Click the **Cognos** namespace.

   Tip: If you want to delete a Cognos group or role, select the check box next to it and click the delete button.
4. On the toolbar, click the new group or new role button.
5. In the **Specify a name and description** page, type a name and, if you want, a description for the new group or role, and then select a destination folder and click **Next**.
6. If you want to create a group without members, click **Finish**.
7. If you want to add members to the new group or role, click **Add** and choose how to select the users, groups, or roles:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.

- To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
- To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

  namespace/group_name;namespace/role_name;namespace/user_name;

  Here is an example:

  Cognos/Authors;LDAP/scarter;

8. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

9. Click **Finish**.

Add or Remove Members of a Cognos Group or Role

You can modify the membership of a Cognos group or role by adding or removing members.

When you remove users, groups, or roles from a Cognos group or role, you do not delete them from the authentication provider or from Cognos 8.

If you plan to modify groups or roles that reference entries from multiple namespaces, you must log on to each of those namespaces before you start your task. Otherwise, you will not have full administrative rights for the entries you want to modify.

To access the directory administration tool, you must have execute permissions for the directory secured feature and traverse permission for the Administration secured function (p. 627).

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Security** tab, click **Users, Groups, and Roles**.
3. Click the **Cognos** namespace.
4. In the **Actions** column, click the properties button for the group or role whose membership you want to modify.
5. Click the **Members** tab.
6. If you want to add members, click **Add** and choose how to select members:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.

- To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

  namespace/group_name;namespace/role_name;namespace/user_name;

  Here is an example:

  Cognos/Authors;LDAP/scarter;

7. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

8. To remove members from a Cognos group or role, in the **Set Properties** page, specify which users, groups, or roles to remove, and click **Remove**.

9. Click **OK**.

Chapter 11: Access Permissions

In Cognos 8, you can secure your organization's data by setting access permissions for the entries. You specify which users and groups have access to a specific report or other content in Cognos 8. You also specify the actions they can perform on the content.

When you set access permissions, you can reference both authentication provider users, groups, and roles and Cognos groups and roles. However, if you plan to deploy your application in the future, we recommend that you use only the Cognos groups and roles to set up access to entries in Cognos 8 to simplify the process (p. 194).

Permissions and Permitted Actions

You can grant or deny the following access permissions.

Permissions	Icons	Permitted Actions
Read		View all the properties of an entry, including the report specification, report output, and so on, which are properties of a report. Create a shortcut to an entry.
Write		Modify properties of an entry. Delete an entry. Create entries in a container, such as a package or a folder. Modify the report specification for reports created in Report Studio and Query Studio. Create new outputs for a report.

Permissions	Icons	Permitted Actions
Execute		Process an entry. • For entries such as reports, agents, and metrics, the user can run the entry. • For data sources, connections, and signons, the entries can be used to retrieve data from a data provider. The user cannot read the database information directly. The report server can access the database information on behalf of the user to process a request. Cognos 8 verifies whether users have execute permissions for an entry before they can use the entry. • For credentials, users can permit someone else to use their credentials. **Note:** Users must have execute permissions for the account they use with the run as the owner report option.
Set policy		Read and modify the security settings for an entry.
Traverse		View the contents of a container entry, such as a package or a folder, and view general properties of the container itself without full access to the content. **Note:** Users can view the general properties of the entries for which they have any type of access. The general properties include name, description, creation date, and so on, which are common to all entries.

Access Permissions for Users

Users must have at least traverse permissions for the parent entries of the entries they want to access. The parent entries include container objects such as folders, packages, groups, roles, and namespaces.

Permissions for users are based on permissions set for individual user accounts and for the namespaces, groups, and roles to which the users belong. Permissions are also affected by the membership and ownership properties of the entry.

Cognos 8 supports combined access permissions. When users who belong to more than one group log on, they have the combined permissions of all the groups to which they belong. This is important to remember, especially when you are denying access.

Tip: To ensure that a user or group can run reports from a package, but not open the package in a Cognos studio, grant the user or group execute and traverse permissions on the package.

Access Permissions Required for Actions

To perform specific actions, each user, group, or role needs the right combination of access permissions granted for the entry, its parent entry, and its source and target entry. The following table lists permissions required for specific actions.

Action	Permissions required
Add an entry	Write permissions for a parent entry
Query the entry properties	Read permissions for an entry
View the children of the entry	Traverse permissions for an entry
Update an entry	Write permissions for an entry
Delete an entry	Write permissions for an entry, and write permissions for a parent entry
Copy an entry	Read permissions for an entry and any child entries, traverse permissions for all of the children, and write and traverse permissions for the target parent entry
Move an entry	Read and write permissions for an entry, write permissions for both the source parent entry and the target parent entry, and traverse permissions for the target parent entry

Ownership of Entries

If the user is an owner of an entry, the user has full access rights for the entry. This ensures that users can always access and modify the entries they own. By default, the owner of the entry is the user who creates the entry. However, any other user who has set policy permissions for the entry can take ownership of the entry.

Granted and Denied Access

You can grant access or deny access to entries. Denied access has precedence over granted access. When you deny specific users or groups access to an entry, you replace other security policies that grant access to the entry.

If the grant and deny permissions are in conflict, access to the entry is always denied. For example, a user belongs to two groups. One group has access granted to a report and the other group has access denied to the same report. Access to this report is denied for the user.

Deny access only when it is really required. Typically, it is a better administrative practice to grant permissions than to deny them.

Parent/Child Permissions

Access permissions are acquired from parent entries. If access permissions are not defined, the entry acquires permissions from its parent entry. You can replace parent permissions by defining permissions for the child entry.

Objects that exist only as children of other objects always acquire permissions from their parents. Examples of such objects are report specifications and report outputs. They are visible through the SDK. You cannot set permissions specifically for those objects.

Permissions and Deployment

If you are an administrator who is deploying to a target environment, see "Deployment" (p. 277).

Capabilities Permissions

If you are an administrator, you set access to the secured functions and features by granting execute permissions for specified namespaces, users, groups, or roles. For more information, see "Secured Functions and Features" (p. 199).

Deleting Cognos Groups and Roles

When you delete a Cognos group or role, access permissions based on it are also deleted. You cannot restore them by creating a new group or role with the same name because this entry has a different internal ID.

If your groups or roles are created by authentication providers, check how your authentication provider deals with such situations. Typically, you cannot recreate access permissions if they are based on IDs but you can if they are based on names.

Accessing Entries Associated with Data Sources Secured Against Multiple Namespaces

Data sources in Cognos 8 can be secured against multiple namespaces. In some environments, the namespace used to secure the data source is not the primary namespace used for access to Cognos Connection. When you try to access an entry, such as a report, a query, or an analysis, that is associated with a data source secured against multiple namespaces, and you are not logged on to all of the required namespaces, a prompt for authentication appears. You must log on to the namespace before you can access the entry.

When single signon (SSO) is enabled, the prompt for authentication does not appear. You are automatically logged on to the namespace.

This functionality applies to Cognos Viewer only. If a similar situation occurs in a Cognos 8 studio, you must quit your task and log on to all the namespaces that you want to use in the current session.

Set Access Permissions for an Entry

Setting access permissions for an entry includes creating new permissions or updating existing permissions. You can specify access permissions for all entries in Cognos 8. Some examples of such entries are reports, queries, analyses, packages, agents, metrics, namespaces, groups, users, or dispatchers. You can reference entries from different namespaces.

If you plan to set permissions that reference multiple namespaces, you must log on to each of those namespaces before you start your task. Otherwise, you do not have full administrative rights for the entries you want to modify.

To administer security, you must have set policy permissions.

Steps

1. In Cognos Connection, locate the entry for which you want to set access permissions.
2. In the **Actions** column, click the set properties button for the entry.
3. In the **Set properties** page, click the **Permissions** tab.
4. Choose whether to use the permissions of the parent entry or specify permissions specifically for the entry:
   - To use the permissions of the parent entry, clear the **Override the access permissions acquired from the parent entry** check box, then click OK if you are prompted to use the parent permissions. Click **OK**.
   - To set access permissions for the entry, select the **Override the access permissions acquired from the parent entry** check box, then proceed to step 5.
5. If you want to remove an entry from the list, select its check box and click **Remove**.

   Tip: If you want to select all entries, select the check box at the top of the list in the upper-left corner. Clear the check box to deselect all entries.
6. To specify the entries for which you want to grant or deny access, click **Add**, then choose how to select entries:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     namespace/group_name;namespace/role_name;namespace/user_name;

     Here is an example:

     Cognos/Authors;LDAP/scarter;
7. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

8. For each entry in the list, in the box next to the list, select or clear check boxes to specify what type of access you want to grant or deny.
9. Click **Apply**.

   In the **Permissions** column, an icon appears next to the user, group, or role. This icon represents the type of access granted or denied to the entry.
10. If you want to replace the existing permissions of the child entries with the permissions you set for this entry, in the **Option** section, select the **Delete the access permissions of all child entries** check box.

    This option appears only with the entries that are containers. You can use it to restrict access to a hierarchy of entries.
11. Click **OK**.

Trusted Credentials

Trusted credentials are used for users who must perform a task or process, but do not have sufficient access permissions for entries that contain sensitive data, such as database signons and group memberships. Users with more extensive access permissions, who own the entries, can authorize a trusted user to use their credentials to access the entries.

Trusted credentials are also used to run scheduled requests when users are not logged on to Cognos 8, for example, overnight. When the request runs, a user session is created. The trusted credential is used to log on to Cognos 8 as the user the trusted credential represents and the user's access permissions are used to run the report or the job.

The credentials are stored as part of the account object in the namespace.

Create Trusted Credentials

You can create trusted credentials (p. 196) when you want to authorize other users to use your credentials when those users do not have sufficient access permissions to perform specific tasks.

For users to use trusted credentials, traverse permissions must be granted for the namespace.

Steps

1. In Cognos Connection, in the upper-right corner, click the my area button , **My Preferences**.
2. On the **Personal** tab, under **Credentials**, if you have not created credentials before, click **Create the Credentials**.
3. Select the users, groups, or roles you want to authorize to use your credentials.

   If you are prompted for your credentials, provide your user ID and password.
4. If you want to add entries, click **Add** then choose how to select entries:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.

- To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
- To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

  namespace/group_name;namespace/role_name;namespace/user_name;

  Here is an example:

  Cognos/Authors;LDAP/scarter;

5. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

6. If you want to remove an entry from the list, select the check box next to it and click **Remove**.
7. Ensure that the list contains only the users, groups, or roles that you want, and click **OK**.

Chapter 12: Securing Functions and Features

The secured functions and secured features within the functions, which are also referred to as capabilities, control access to different administration tasks and different functional areas of the user interface in Cognos 8(p. 199). Examples of the secured functions are **Administration** and **Report Studio**. Examples of the secured features are **User Defined SQL** and **Bursting**(p. 199).

Content Manager reads the users' permissions at logon time. Depending on the permissions for the secured functions and features, users can access specific components and perform specific tasks in Cognos 8.

When a content store is initialized, the initial permissions for the secured functions and features are created(p. 627). The permissions define which of the predefined and built-in Cognos groups and roles have access to which secured functions and features, and the type of access. The initial permissions grant unrestricted access to Cognos 8 because the built-in role System Administrators includes the group Everyone in its membership. You must remove the group Everyone from the membership of System Administrators before you start setting access to capabilities. For more information, see "Initial Security" (p. 207).

When running a report using the **Run as the owner** option, the capabilities of the owner are used for bursting and report layout properties in the HTML format. All other capabilities are based on the user who runs the report.

Secured Functions and Features

The secured functions and features control access to different administration tasks and different functional areas of the user interface in Cognos 8. Administrators can set up access to the secured functions and features using the **Capabilities** page on the **Security** tab in **Cognos Administration** (p. 203). Users can see a list of the secured functions and features available to them in the portal in **My Area** , **My Preferences**, on the **Personal** tab, in the **Capabilities** section.

The secured functions and features include the following.

Administration

This secured function contains the secured features that control access to the administration pages that you use to administer Cognos 8. System administrators can use this capability to delegate administration tasks to different administrators.

The secured features associated with this function are

- **Set capabilities and manage UI profiles**

  Users can access **Capabilities** and **User Interface Profiles** on the **Security** tab in **Cognos Administration** to manage the secured functions and features and the Report Studio user interface profiles.

- **Administration tasks**

  Users can access **Content Administration** on the **Configuration** tab in **Cognos Administration** to administer exports, imports, index updates, consistency checks, and report updates.

- **Controller Administration**

  Users can use the administrative functions of Cognos 8 Controller.

- **Data Source Connections**

  Users can access **Data Source Connections** on the **Configuration** tab in **Cognos Administration** to define data sources, connections, and signons.

- **Distribution Lists and Contacts**

  Users can access **Distribution Lists and Contacts** on the **Configuration** tab in **Cognos Administration** to manage distribution lists and contacts.

- **Metric Studio Administration**

  Users can create new metric packages using the new metric package wizard in Cognos Connection, and access the **Tools** menu in Metric Studio.

- **Run activities and schedules**

  Users can access **Current Activities**, **Past Activities**, **Upcoming Activities** and **Schedules** on the **Status** tab in **Cognos Administration** to monitor the server activities and manage schedules. To grant access to the scheduling functionality independently from the monitoring functionality, use the Scheduling capability.

- **Planning Administration**

  Users can access Cognos 8 Planning - Contributor Administration Console and Cognos 8 Planning - Analyst to perform administration tasks.

- **Styles and portlets**

  Users can access **Styles** and **Portlets** on the **Configuration** tab in **Cognos Administration** to manage styles and portlets.

- **Printers**

  Users can access **Printers** on the **Configuration** tab in **Cognos Administration** to manage printers.

- **Configure and manage the system**

  Users can access **System** on the **Status** tab and **Dispatchers and Services** on the **Configuration** tab in **Cognos Administration** to configure dispatchers and services, and to manage the system.

- **Users, Groups and Roles**

  Users can access **Users, Groups and Roles** on the **Security** tab in **Cognos Administration** to manage namespaces, users, groups, and roles.

Analysis Studio

This secured function controls access to Analysis Studio.

Cognos Viewer

This secured function controls access to Cognos Viewer, which you use to view reports.

The secured features associated with this function are

- **Context Menu**

  Users can use the context menu in Cognos Viewer.

  Note: To see the context menu, users must have access to both the **Selection** and **Context Menu** secured features.

- **Run With Options**

  Users can change the default run options.

- **Selection**

  Users can select text in lists and crosstabs.

- **Toolbar**

  Users can see the Cognos Viewer toolbar.

Conditional Subscriptions

This secured function controls access to the **Rules** tab in **My Watch Items** in Cognos Connection. Use this to create and run watch rules.

Controller Studio

This secured function controls access to Cognos 8 Controller.

Data Manager

This secured function controls access to Cognos 8 Data Manager.

Detailed Errors

This secured function controls access to viewing detailed error messages in the Web browser.

Drill Through Assistant

This secured function controls access to the drill-through functionality in Cognos 8, including the **Drill-through Definitions** page in Cognos Connection.

Event Studio

This secured function controls access to Event Studio.

Metric Studio

This secured function controls access to Metric Studio.

The secured feature associated with this function is

- **Edit View**

Users can use the edit features of Metric Studio to edit metric content.

Planning Contributor

This secured function controls access to Cognos 8 Planning - Contributor and Cognos 8 Planning - Analyst.

Query Studio

This secured function controls access to the Query Studio, which you use to create simple, ad hoc reports.

The secured features associated with this function are

- **Create**

  Users can create new reports and use the Save as option for new reports and custom views.

- **Advanced**

  Users can use advanced authoring features, such as creating complex filters, formatting style, and multilingual support.

Report Studio

This secured function controls access to Report Studio, which you use to author professional reports.

The secured features associated with this function are

- **Bursting**

  Users can author and run burst reports.

- **Create/Delete**

  Users can create new reports, use the Save as option for new reports and report views, and change models.

- **HTML Items in Report**

  Users can use the button, HTMLItem, and hyperlink elements of the report specification when authoring reports.

- **User Defined SQL**

  Users can edit the SQL statements directly in the query specification and run the query specifications that contain the edited SQL statements.

  Note: Restrictions on who can use this feature are not enforced in Framework Manager. For example, a Framework Manager user who does not have **User Defined SQL** rights in **Cognos Administration** can still create a query subject and use manually created SQL queries to search a database.

Scheduling

This secured function controls access to the scheduling functionality for items that can be run, such as reports.

The secured feature associated with this function is

- **Scheduling Priority**

  Users can set up and change the processing priority of scheduled entries.

Specification Execution

This secured function specifies that a user or SDK application can use an inline specification.

Inline specifications are used internally by the Cognos 8 studios and some services to perform tasks. The service running the specification tests a number of capabilities to ensure that the user is entitled to use the inline specification. For more information, see the runSpecification method in the *Developer Guide*.

This capability is required to author Data Manager tasks.

Set Access to a Secured Function or Feature

You set access to the secured functions and features by granting execute permissions for them to specified namespaces, users, groups, or roles. If you set permissions for a secured feature, you must grant execute permissions for the feature and traverse permissions for its parent secured function. For example, to grant access to Report Studio and all its functionality, you grant execute permissions for the **Report Studio** secured function. If you want to grant access only to the **Create/Delete** secured feature within Report Studio, grant traverse permissions for the **Report Studio** secured function and execute permissions for the **Create/Delete** secured feature.

You must have set policy permissions to administer secured functions and features. Typically, this is done by directory administrators.

Before you start setting permissions on capabilities, ensure that the initial security settings are already changed.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Security** tab, click **Capabilities**.

   A list of available secured functions appears.
3. Choose whether to set access for a function or for a feature:

   - To set access for a function, click the actions button next to the function name, and click **Set properties**.
   - To set access for a feature, click the actions button next to the feature name, and click **Set properties**.

Tip: Functions that have secured features have links.

4. Click the **Permissions** tab.
5. Choose whether to use the permissions of the parent entry or specify different permissions:
   - To use the permissions of the parent entry, clear the **Override the access permissions acquired from the parent entry** check box, and click **OK**.
   - To set access permissions explicitly for the entry, select the **Override the access permissions acquired from the parent entry** check box, and then perform the remaining steps.
6. If you want to remove an entry from the list, select its check box and click **Remove**.

   Tip: To select or deselect all entries in a page, click **Select all** or **Deselect all** at the bottom of the list.
7. If you want to add new entries to the list, click **Add** and choose how to select entries:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     namespace/group_name;namespace/role_name;namespace/user_name;

     Here is an example:

     Cognos/Authors;LDAP/scarter;
8. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.
9. Select the check box next to the entry for which you want to set access to the function or feature.
10. In the box next to the list, select the proper check boxes to grant execute permissions for the entry.
11. Click **Apply**.

    In the **Permissions** column, an icon that denotes the execute permissions granted appears next to the namespace, user, group, or role.
12. Repeat steps 8 to 10 for each entry.
13. Click **OK**.

Set Access to the Report Studio User Interface Profiles

To meet the needs of both regular report authors and financial report authors, Report Studio provides distinct custom user interfaces that contain reporting features relevant to these roles.

The following user interfaces are supported:

- Professional Authoring Mode

  The Professional authoring mode gives users access to the full range of Report Studio functionality. In this mode, you can create any report type, including charts, maps, lists, and repeaters, using any data source (relational or multi-dimensional).

- Express Authoring Mode

  The Express authoring mode provides a simplified and focused Report Studio interface. It is designed for non-technical users to create traditional financial and management statement reports. It only allows access to dimensionally-modeled data and uses a member-oriented data tree.

  This authoring mode supports only crosstab reports, for users who want a default financial layout, with indentation and single member insertion. A Windows-like toolbar offers buttons to easily style your reports rather than using property sheets.

  In addition, a page section and context area (similar to Analysis Studio) allow you to easily create multi-page, filtered, and prompted crosstabs.

To support the different authoring modes in Report Studio, Cognos Administration provides two **User Interface Profiles** named **Professional** and **Express**. Use the **Professional** profile to set access to the Professional mode, and the **Express** profile to set access to the Express mode.

If users have access to both the Professional and Express authoring modes, they can later switch between the two in Report Studio. For more information, see the Report Studio *Professional Authoring User Guide*.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Security** tab, click **User Interface Profiles**.
3. Specify access permissions for the user interface profile you want

   - To grant access to the Professional authoring mode, click the actions button next to **Professional**, and click **Set properties**.
   - To grant access to the Express authoring mode, click the actions button next to **Express**, and click **Set properties**.

   The **Permissions** page appears.
4. Select the **Override the access permissions acquired from the parent entry** check box.

5. In the box on the left, select the check box next to the user, group, or role for which you want to grant access to this user interface profile.

6. In the box on the right, grant execute and traverse permissions for the selected users, groups, or roles.

   No other permissions are required.

7. Click **OK**.

For more detailed information about setting access permissions, see "Set Access Permissions for an Entry" (p. 194).

Chapter 13: Initial Security

When a content store is initialized, a set of security objects is created and stored in the Cognos namespace. They are designed to simplify the Cognos 8 administration. The initial security policies grant unrestricted access to all objects in the content store to all users.

The security administrator must modify the initial security settings to secure the content store (p. 210).

To see a summary of the initial access permissions for the Content Manager objects, see "Initial Access Permissions " (p. 625).

Built-in Entries

The built-in entries include the Anonymous user account, the groups All Authenticated Users and Everyone, and the role System Administrators. You cannot delete the built-in entries. They appear in both secured and non-secured environments.

Anonymous

This entry represents a user account shared by members of the general public who can access Cognos 8 without being prompted for authentication. For example, this type of access is useful when distributing an online catalog.

Anonymous users can see only those entries for which access permissions are not set, or are set specifically for this account or for the Everyone group.

You can disable the Anonymous user account by changing the configuration parameters in the configuration tool.

All Authenticated Users

This group represents users who are authenticated by authentication providers. The membership of this group is maintained by the product and cannot be viewed or altered.

You cannot deploy this group (p. 283).

Everyone

This group represents all authenticated users and the Anonymous user account. The membership of this group is maintained by the product and cannot be viewed or altered.

You can use the Everyone group to set default security quickly. For example, to secure a report, you grant read, write, or execute permissions to the report for the Everyone group. After this security is in place, you can grant access to the report to other users, groups, or roles, and remove the group Everyone from the security policy for this report. Then, only users, groups, and roles that you specified have access granted to the report.

You can use the Everyone group to apply security during deployment (p. 278), but you cannot deploy the group itself (p. 283).

System Administrators

This is a special role in Cognos 8. Members of this role are considered root users or super users. They may access and modify any object in the content store, regardless of any security policies set for the object. Only members of the System Administrators role can modify the membership of this role.

The System Administrators role cannot be empty. If you do not want to use System Administrators, you can create an empty group in the Cognos namespace or in your authentication provider, and add this group to the membership of the System Administrators role.

When this role is created during the content store initialization, the group Everyone is included in its membership. This means that all users have unrestricted access to the content store. Immediately after installing and configuring Cognos 8, you must modify the initial security settings for this role and remove the group Everyone from its membership (p. 210).

You can deploy this role (p. 283).

Predefined Entries

The predefined entries include several Cognos roles (p. 186). Each of the roles has a specific set of access permissions, and can be used to secure different components and functions in Cognos 8. You can use the predefined roles, or delete them.

When the predefined roles are created during the content store initialization, the group Everyone is a member of some of them. Some of such roles are Consumers, Query Users, Analysis Users, and Authors. If you want to use the predefined roles, we recommend that you modify their initial membership immediately after installing and configuring Cognos 8 (p. 210).

The predefined roles include the following.

Role	Description
Analysis Users	Members have the same access permissions as Consumers. They can also use the Cognos Analysis Studio.
Authors	Members have the same access permissions as Query Users and Analysis Users. They can use Report Studio, Query Studio, and Analysis Studio, and save public content, such as reports and report outputs.
Consumers	Members can read and execute public content, such as reports.

Role	Description
Controller Administrators	Members have full access to Cognos Controller menus and can create individual Cognos Controller users and define their limitations.
Controller Users	Members have general access to Cognos Controller menus.
Data Manager Authors	Members can use Data Manager to create data warehouses and data repositories for reporting, analysis, and performance management.
Directory Administrators	Members can administer the contents of namespaces. In the Cognos namespace, they administer groups, accounts, contacts, distribution lists, data sources, and printers.
Express Authors	Members can use the Report Studio **Express** user interface profile.
Metrics Administrators	Members can administer metric packages and tasks in Cognos Connection.
Metrics Authors	Members can create and edit scorecard applications in Metric Studio.
Metrics Users	Members can monitor performance in Metric Studio.
Portal Administrators	Members can administer the Cognos portlets and third-party portlets in Cognos Connection. This includes customizing portlets, defining portlet styles, and setting access permissions for portlets.
Planning Contributor Users	Members can access the Contributor Web client, Contributor Add-in for Excel, or Analyst.
Planning Rights Administrators	Members can access Contributor Administration Console, Analyst, and all associated objects in the application.
Query Users	Members have the same access permissions as Consumers. They can also use the Cognos Query Studio.

Role	Description
Readers	Members have read-only access to Cognos 8. They can navigate some portions of the content store, view saved report outputs in the portal, select cells in saved report outputs in Cognos Viewer, and use the Cognos Viewer context menu to perform actions, such as drill-through.
Report Administrators	Members can administer the public content, for which they have full access. They can also use Cognos Report Studio and Cognos Query Studio.
Server Administrators	Members can administer servers, dispatchers, and jobs.

Specify Security Settings After Installation

When the initial security entries are created during the content store initialization, the group Everyone is a member of the System Administrators role. This means that all users have full access to the content store. To limit that access, you must add trusted users as members of this role, and then remove the group Everyone from its membership.

You must also modify the initial security settings for the predefined roles that include the group Everyone in their initial membership, such as Consumers, Query Users, and Authors. Make similar modifications for them as you do for the System Administrators role.

If you do not want to use the predefined roles, you can delete them.

To secure the Cognos namespace, modify its initial access permissions by granting access for the users you want.

When you set access permissions, you should not explicitly deny access to entries for the group Everyone. Denying access overrides any other security policies for the entry. If you denied access to the entry for Everyone, the entry would become unusable.

Your Cognos 8 installation must already be configured to use an authentication provider, which is documented in the *Installation and Configuration Guide*.

Steps for System Administrators and Predefined Roles

1. In Cognos Connection, in the upper-right corner, click **Launch, Cognos Administration**.
2. On the **Security** tab, click **Users, Groups, and Roles**.
3. Click the **Cognos** namespace.
4. For the role you want, in the **Actions** column, click the set properties button.
5. On the **Members** tab, modify the membership list:

- Ensure that one or more users defined in the third-party authentication provider are members.
- Remove the group Everyone.

6. Click **OK**.
7. On the **Permissions** tab, set access permissions for this role to prevent unauthorized users from creating, updating, or deleting the content, and then click **OK**.

   For each role, repeat steps 3 to 6.

Steps for the Cognos Namespace

1. In Cognos Connection, in the upper-right corner, click **Launch, Cognos Administration**.
2. On the **Security** tab, click **Users, Groups, and Roles**.
3. In the **Actions** column next to the Cognos namespace, click the set properties button.
4. On the **Permissions** tab, set access permissions for the **Cognos** namespace to prevent unauthorized users from creating, updating, or deleting the content.

   We recommend that you remove the group Everyone. However, you may leave it, depending on your requirements.
5. If you want, select the **Delete the access permissions of all child entries** check box.
6. Click **OK**.

Securing the Content Store

To ensure its security and integrity, the content store is accessed by the Content Manager service using single database signon specified in Cognos Configuration. The database signon is encrypted according to your encryption standards. However, the content store security relies not only on the Cognos 8 security but also on the native database security, operating system security, and network security.

For securing your database, we recommend that you follow these guidelines:

- ❑ Secure the database and the database API using the mechanisms provided by the database, the network, and the operating system.
- ❑ Assign a limited number of users to maintain the database.
- ❑ Use your database native security to grant only minimum permissions to the user accounts that access the database, as follows:
  - MS SQL Server

    Users must have create and drop table permissions for the database. Ensure that the user account is a member of the db_ddladmin, db_datareader, and db_datawriter roles, and the owner of their default schema.

- ORACLE

  Users must have permissions to connect to the database. Also, they must be able to create, alter, and drop tables, triggers, views, procedures, and sequences, as well as insert, update, and delete data in the database tables. The permissions must be granted to the user account directly, and not through a group or role membership.

- DB2

  Users must have the create, drop table, CREATETAB, CONNECT and IMPLICITSCHEMA permissions for the database. Also, they must have USE permissions for the USER TEMPORARY tablespace and other appropriate tablespaces associated with the database.

- Sybase Adaptive Server Enterprise

  Users must have create, drop table, create default, create procedure, create rule, create table, and create view permissions for the database.

- ❑ Limit the number of users who have read or write access for the Content Manager tables.
- ❑ Follow other recommendations on securing the database provided by the database vendor.

Chapter 14: Cognos Connection

Cognos Connection is the portal to Cognos 8, the Web-based reporting solution. Cognos Connection provides a single access point to all corporate data available in Cognos 8.

You can use Cognos Connection to work with entries such as reports, analyses, queries, agents, metrics, and packages. You can use Cognos Connection to create shortcuts, URLs, and pages, and to organize entries. You can personalize Cognos Connection for your own use.

You can use Cognos Connection to create and run reports and cubes (p. 317) and distribute reports (p. 340). You can also use it to create and run agents (p. 351) and schedule entries (p. 269).

As an administrator, you can use Cognos Connection to administer servers, optimize performance, and set access permissions (p. 191). You can also use it for entry administration, including such things as scheduling and distributing reports, agents, and metrics.

If you use a customized user interface, you may not have access to all the features documented.

Log On

Cognos 8 supports authenticated and anonymous user access. To use Cognos 8 as an authenticated user, you must successfully log on. During the logon process, you must provide your credentials, such as user ID and password, as required by your organization. Anonymous users do not log on.

Tip: If you want to see a summary of your logon information for the current session, in the portal, click **My Area**, **My Preferences** and then click the **Personal** tab. This is not available to anonymous users.

Steps

1. In the portal, click **Log On**.
2. If the namespace **Logon** page appears, in the **Namespace** box, click the namespace you want to use.
3. Click **OK** and type your user ID and password.
4. Click **OK**.

   Your session starts.

Log Off

You log off to end your session. Even if you used multiple namespaces in the session, you log off only once.

If you close your Web browser without logging off, your session ends.

Steps

1. In the portal, click **Log Off**.

   You are now logged out of all the namespaces you were using.

2. Choose whether to log on again:
   - If you do not want to log on again, close your Web browser.
   - If you want to log on as an authenticated user, click **Log on again**.
   - If you want to log on as an anonymous user, click **Open a session as an anonymous user**. This is available only if your administrator set it up.

Create a Shortcut

A shortcut is a pointer to another entry such as a report, report view, folder, job, agent, page, or URL.

You can use shortcuts to organize information that you use regularly. For example, if you frequently use a report in Public Folders, you can create a shortcut in My Folders.

If you want to make a new entry, it might be easier to make a copy of an existing entry (p. 224) and modify it. If you want to run an existing agent or report with some minor changes, create an agent view (p. 353) or a report view (p. 324). For example, to change the format, language, or delivery method of a report, create a report view.

You cannot update the source entry by clicking the shortcut. Updating the source automatically updates all shortcuts to the entry.

Tip: If the source entry was deleted or moved to another location, the shortcut icon changes to indicate a broken link.

You can change access permissions for a shortcut entry, but it does not change the access permissions for the source entry.

Steps

1. In Cognos Connection, locate the entry you want to create a shortcut to.
2. Under **Actions**, click **More** and then click **Create a shortcut to this entry** .
3. In the **Name** box, type the name of the shortcut.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 231). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

5. If you do not want to use the target folder shown under **Location**, choose another location:
   - Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.
   - Click **Select My Folders** as the location.
6. Click **Finish**.

In the portal, shortcut entries are identified by the shortcut icon .

Create a URL

A URL is a standard way of identifying the location for any external file or Web site. Create URLs to keep the files and Web sites you use most frequently at your fingertips. Clicking a URL opens the file or Web site in the browser. After opening a URL, click the back button in your browser to return to the portal.

The URL must contain a valid server name that is included in the valid domains list, as specified by your administrator. Otherwise, you cannot create the URL.

Administrators maintain the list of valid domains in Cognos Configuration, in the **Cognos Application Firewall** category, the **Valid domains or host** property. For more information, see the *Installation and Configuration Guide*.

Steps

1. In Cognos Connection, go to the folder where you want to create the new URL.
2. Click the new URL button on the toolbar.
3. In the **Name** box, type the name of the new URL.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 231). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. In the **URL** box, type the URL location.

   If the URL points to a Web site address, the protocol must be included. For example, to create a URL for the Cognos Web site, type http://www.cognos.com.
6. If you do not want to use the target folder shown under **Location**, choose another location:
7. - Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.
   - Click **Select My Folders** as the location.
8. Click **Finish**.

In the portal, URL entries are identified by the URL icon .

Bookmark an Entry

You can bookmark a Cognos 8 entry in your Web browser so that later you can quickly perform the default action associated with the entry. For example, using a report bookmark, you can view the most recent report output, run the report, or open it in an authoring tool. For more information, see "Set Default Report Options" (p. 318).

The bookmark saves the URL of the entry and its default action at the time when the bookmark was created.

Some default actions are available only to users who

- have the required access permissions for the entries.
- have the required product components installed.
- have access to specific, secured functions and features.

  For example, the capabilities to use a specific Cognos 8 studio.
- use specific Web browsers.

For example, to open an agent, users must have read and traverse permissions for the agent, have Event Studio installed and the permissions to use it, and use Internet Explorer as their Web browser.

Steps for Internet Explorer

1. In Cognos Connection, locate the entry for which you want to create a bookmark.
2. In the **Actions** column, click **More**.
3. In the list of actions available for this entry, click **Add to bookmarks** .

   The Internet Explorer box for adding favorites appears.
4. Create the bookmark as you normally do in Internet Explorer.

Steps for All Web Browsers

1. In Cognos Connection, locate the entry for which you want to create a bookmark.
2. In the **Actions** column, click the set properties button for the entry.
3. On the **General** tab, click **View the search path, ID and URL**.
4. Right-click the link that appears under **Default action URL**.

   The link shows the entry name and the action that will be performed. If the entry has no default actions, the link is replaced by **None**. The text below the link shows the URL used by the link.

   A menu box specific to your Web browser appears.

5. From the menu, click the option for creating bookmarks.

   For example, if you are using Internet Explorer, click **Add to Favorites**. If you are using Firefox, click **Bookmark This Link**.

6. Create the bookmark as you normally do in your Web browser.

Models and Packages

Models and packages use corporate business rules to define and group the data to be used for business reporting.

A model is a data structure containing imported data from one or more data sources. Cognos 8 users responsible for data modeling use Framework Manager to create models.

The data modeler creates a package that defines a subset of data that is relevant to an intended group of users. For example, the data modeler may create a package that marketing managers use for information related to market research. The package can then be distributed to report authors by publishing it to the portal. When you run a report, the result set is defined by the data retrieval information defined in the package.

In Cognos Connection, you can manage packages the way you manage other entries. For example, you can organize packages in folders, create shortcuts to packages, and move or copy packages.

For more information about models and packages, see the Framework Manager *User Guide*.

Entry Properties

You can control the way an entry appears and behaves by modifying its properties. The properties for entries vary depending upon the type of entry selected and your privileges. For example, reports have properties to control run options while folders do not. If a property is not applicable to the type of entry you are customizing, it will not appear in the **Set properties** page.

General Properties

General properties appear on the **General** tab of the **Set properties** page.

Property	Description
Type	The type of entry.
Owner	The owner of the entry. By default, the owner is the person who created the entry. When the owner no longer exists in the namespace, or is from a different namespace than the current user, the owner shows as **Unknown**. If you have Set policy permissions, click **Make me the owner** to become the owner of the entry.

Property	Description
Contact	The person responsible for the entry. Click **Set the contact** and then click **Select the contact** to set the contact for the entry or click **Enter an email address** to enter the contact's email address.
Location	The location of the entry in the portal and its ID. Click **View the search path, ID and URL** to view the fully qualified location and the ID of the entry in the content store. Entries are assigned a unique identification (ID) number. For more information, see "Organizing Entries" (p. 224).
Created	The date the entry was created.
Modified	The most recent date that the entry was modified.
Icon	The icon for the entry. Click **Edit** to specify an alternative icon. For more information, see "Specify an Alternative Icon for an Entry" (p. 229)
Disable this entry	When selected, users that do not have write permissions for this entry cannot access it. The entry is no longer visible in the portal. If an entry is disabled and you have write access to it, the disabled icon appears next to the entry.
Language	A list of languages that are available for the entry name, screen tip, and description according to the configuration set up by your administrator. Click **Remove values for this language** to remove the entry name, screen tip, and description for a specified language.
Name	The name of the entry for the selected language.
Screen tip	An optional description of the entry. The screen tip appears when you pause your pointer over the icon for the entry in the portal. Up to 100 characters can be used for a screen tip.
Description	An optional description of the entry. It appears in the portal when you set your preferences to use the details view. Details view appears only in Public Folders and My Folders.
Run history	The number of occurrences or period of time to retain run histories for the entry.

Property	Description
Report output versions	The number of occurrences or period of time to keep report outputs. Setting this value to zero (0) saves an unlimited number of versions.
Package	The package that is associated with the entry. If the source package was moved or deleted, the text reads "Unavailable." Click **Link to a package** to link the entry to a different package. For more information, see "Select a Link for an Entry" (p. 227).
URL	A URL to either a file or Web site address. For more information, see "Create a URL" (p. 215). This field is visible only if you have read permissions for the entry. If you have write permissions without read permissions, this property is not visible.
Source report	A path to the source entry for a report view. If the source entry was moved or deleted, the text reads "Unavailable." Click **Report Properties** to view the properties of the source report. Click **Link to a report** to link the entry to a different package. For more information, see "Select a Link for an Entry" (p. 227).
Source agent	A path to the source entry for an agent view. If the source entry was moved or deleted, the text reads "Unavailable." Click **Agent Properties** to view the properties of the source report. Click **Link to an agent** to link the entry to a different package. For more information, see "Select a Link for an Entry" (p. 227).
Shortcut to	A path to the entry that the shortcut points to. If the referred entry no longer exists, the text reads "Source entry not found." Click **Source Properties** to view the properties of the source entry.
Advanced routing	A list of keywords used to direct requests by package, user group, or user role to dispatchers in identified server groups. Click **Set** to add routing keywords for packages, user roles, or user groups. The rules used to direct the requests are part of **Cognos Administration**.
Gateway	The location of the web server where the originating Cognos product resides. Applies only to Series 7 PowerPlay reports.

Permissions

Permissions appear on the **Permissions** tab of the **Set properties** page.

Property	Description
Override the access permissions	Whether to replace the permissions that are inherited from the parent entry.
Access permissions (Name, Type, Permissions)	The permissions that are set for the entry. You can grant or deny read, write, execute, set policy, and traverse permissions. For more information, see "Access Permissions" (p. 191). Click **Add** to add more names to the list. Click **Delete** to delete names from the list.
Delete the access permissions of all child entries	Whether to remove the existing access permissions for all child entries so that they will use the access permissions for this entry.

Report, Query, Analysis, and PowerPlay Report Properties

Report properties appear on the following tabs of the **Set properties** page:

- the **Report** tab for Report Studio reports
- the **Query** tab for Query Studio reports
- the **Analysis** tab for Analysis Studio reports
- the **PowerPlay Report** tab for Series 7 PowerPlay reports

You can select the available paper sizes. In Cognos Connection, click **Cognos Administration** and then click **Configuration**. Click **Dispatchers and Services** and then click the define paper sizes button . To add new paper sizes, click **New**. To delete paper sizes, click **Delete**.

Property	Description
Default action	The default action when the report is run.
Report options: Override the default values	Whether to override default run options for the report. When selected, the values that you can override appear.
Format	The default format, orientation, and paper size to use when the report runs. Appears only if **Override the default values** is selected.

Property	Description
Language	The default language to use for the report data when the report runs. Appears only if **Override the default values** is selected.
Prompt values	The values that are used to filter data when a report is run (p. 331).
Run as the owner	Whether to use the owner credentials (p. 196) when the report is run.
HTML options: Open in design mode	Whether to open an HTML-format Series 7 PowerPlay report in design mode.
Number of rows per Web page in HTML reports	The number of rows you want to appear per Web page in HTML reports
Enable selection-based interactivity in HTML reports	Whether to enable the following in HTML reports that are viewed in Cognos Viewer: drill up and drill down, drill through, Cognos Search, watch rules, and agent notification. For more information, see (p. 338) Note that to have watch rules evaluated in saved report output, you must select the **Enable enhanced user features in saved output versions** check box.
Enable alerts about new versions	Whether to allow report consumers to receive alerts about new versions of a saved report. If this check box is cleared, you are prompted whether to remove all users from the alert list.
Enable enhanced user features in saved output versions	Whether to create additional output formats so that watch rules can be evaluated and saved output versions can be imported into Cognos 8 Go! Office. Note that to enable watch rules, you must select the **Enable selection-based interactivity in HTML reports** check box.

Job Properties

Job properties appear on the **Job** tab of the **Set properties** page.

Property	Description
Steps	A list of steps in the job.
Submission of steps	Whether to run job tasks all at once or in sequence.
Defaults for all steps	Set default values at the job level. Click **Set**, then specify the defaults for all steps of the job. If no defaults are set, the defaults for the individual steps are used.

Agent Properties

Agent properties appear on the **Agent** tab of the **Set properties** page.

Property	Description
Tasks	A list of tasks in the agent.
Default action	The default action when the agent is run.
Prompt values	The values that are used to filter data when an agent is run (p. 351).
Run as the owner	Whether to use the owner credentials (p. 196) when the agent is run.
Alert list	Whether to allow users to add themselves to the alert list for an agent.

Page Properties

Page properties appear on the **Layout and Content** and **Page Style** tabs of the **Set properties** page.

Property	Description
Number of columns	The number of columns used to organize the content of a page. Up to three columns can be used.
Content	Type of content added to a page. Use to add and remove portlets, distribute the portlets between the columns, change the order of columns and specify their width.
Language	The language in which the page title and instructions can be typed. It should match the product language.

Property	Description
Title	The page title. You can format the title by changing the font and character style, and the text alignment. To return to the default browser settings, click **Return to default**. To modify the default settings, click **Custom**. You can hide the title.
Instructions	Additional information about the page. You can format the text of instructions by changing the font and character style, and the text alignment. To return to the default browser settings, click **Return to default**. To modify the default settings, click **Custom**. You can hide the instructions.
Portlet style	The way a portlet appears on a page. To avoid cluttering the page, you can hide the portlet borders, title bars, and the edit button on the title bar.

Rule Properties

Use the rule properties to define or modify a watch rule. You can access the rule properties from the **My Watch Items**, **Rules** tab by clicking the set properties icon for a watch rule entry. The properties are located on the **Rule** tab of the **Set Properties** page.

The rule properties specify conditions in saved HTML report output so that when the report is saved and the conditions are satisfied, you are alerted.

For information about creating watch rules, see (p. 337).

The following table describes the rule properties that are available.

Property	Description
Disable the rule	Whether to disable the watch rule. When disabled, the watch rule is not applied when report output is generated.
Send an alert when the report *reportname* contains:	The name of the report and the rule defined for the watch rule. To edit the definition, click the existing filter condition, such as **>** (**greater than**) and in the list that appears, click a different condition. Specify a different value in the box.
For the selected context	The objects in the report to which the rule applies.
Alert type	The type of alert you receive when the rule is satisfied. You can be alerted by email or news item.

Organizing Entries

Organize entries such as reports, analyses, agents, and packages in a meaningful way so that you can easily find them. It is important to plan how you can best organize entries in the portal. Review the entries and attempt to group them in a logical way. Consider grouping the entries by type or frequency of use.

You may decide to create a folder hierarchy by using nested folders. The folder structure should be logical and should support the chosen method of grouping.

Use meaningful names and detailed descriptions to identify entries in the portal.

You can copy, move, rename, or delete entries. You can create copies of entries and store them in multiple folders for easy access. You can disable entries and specify the order of entries. You can select a link for an entry. For example, if a report is deleted, you may want to link an associated report view to a different report.

Remember that an entry often refers to other entries such as packages, reports, analyses, or queries. In addition, there may be references to entries in job steps, agents tasks, drill-through targets, or metrics. Reference IDs are hard-coded in the specification for each entry.

Note that references to deployment objects are based on search paths, not IDs. IDs are installation-specific while search paths are not.

Copy an Entry

When you create a copy of an entry, you create a replica of that entry in another location in the portal. For example, create a copy if you want to use a generic report as the underlying structure for additional reports. The copy of the entry has a new ID. If there is another entry of the same name in the target location, you are prompted to replace the existing entry with the copied entry. If you choose to replace the existing entry, the ID of the existing entry is used.

If you copy a folder, references for entries in the folder that reference each other are updated to reference entries in the copied folder.

If you want to run an existing agent or report with some minor changes, create an agent view (p. 353) or a report view (p. 324). For example, to change the format, language, or delivery method of a report, create a report view. You can copy multiple entries at the same time to the same location.

If you want a report to appear in more than one location, create a shortcut (p. 214).

You must have read permissions for an entry you are attempting to copy. You must also have traverse permissions for the current folder, and write and traverse permissions for the target folder (p. 191).

Steps

1. In Cognos Connection, select the check boxes next to the entry or entries you want to copy.
2. Click the copy button on the toolbar.

3. Go to the desired location for the new entry or entries and click the paste button on the toolbar.
4. If an entry name is the same as an entry name in the destination folder, choose whether you want to replace the existing entry with the one that you are copying:
   - To replace the existing entry, click **Yes**.
   - To cancel the copy, click **No**.

Move an Entry

When you move an entry, you remove it from the current folder and place it in another folder.

You may decide to move an entry if your folder becomes so full that it is difficult to locate particular entries. You can create a series of subfolders and move the entries to support your new folder hierarchy. For example, a folder containing weekly sales reports can be divided into sales reports by month or by author.

When you move an entry, the ID stays the same. References to the entry from other entries are not broken. However, shortcuts to the entry no longer work.

For example, a report has several report views associated with it. When you move the report to another location in Cognos Connection, the references in the associated report views are not broken. However, shortcuts to the entry no longer work.

When you move an entry, if there is another entry of the same name in the target location, you are prompted to replace the existing entry with the moved entry. If you choose to replace the existing entry, the ID of the existing entry is kept. References to the moved entry are broken. Shortcuts to the entry no longer work.

If you want to use a generic entry as the underlying structure for additional entries, make a copy of the entry (p. 224). If you want an entry to appear in more than one location, create a shortcut (p. 214). If you want to run an existing agent or report with some minor changes, create an agent view (p. 353) or a report view (p. 324). For example, to change the format, language, or delivery method of a report, create a report view.

You must have read permissions for the entry you are attempting to move. You must also have write and traverse permissions for the current folder and for the target folder.

Steps

1. In Cognos Connection, select the check boxes next to the entry or entries you want to move.
2. Click the cut button on the toolbar.
3. Go to the desired location for the entry or entries and click the paste button on the toolbar.
4. If an entry name is the same as an entry name in the destination folder, choose whether you want to replace the existing entry with the one that you are copying:
   - To replace the existing entry, click **Yes**.

- To cancel the copy, click **No**.

Rename an Entry

You may decide to rename an entry. Perhaps the current name for an analysis is confusing or the purpose of a report changed.

When you rename an entry, the ID stays the same. However, the search path changes. References to the entry from other entries are not broken. Shortcuts to the entry no longer work.

For example, a package has reports, agents, and drill-through definitions associated with it. When you rename the package, the references in the associated reports, agents, and drill-through definitions are not broken.

You cannot rename an entry to the same name as another entry that already exists in the same location.

You must have read permissions for the entry you are attempting to rename. You must also have write and traverse permissions for the current folder and for the target folder.

Steps

1. In Cognos Connection, locate the entry you want to rename, and in the **Actions** column, click the properties button .
2. Click the **Properties** tab.
3. In the **Name** box, type a new name for the entry.
4. Click **OK**.

Disable an Entry

You can disable entries to prevent users from accessing them.

Disabling entries is useful when you want to perform maintenance operations. For example, you may want to disable a folder while you reorganize its content. When you disable a folder, the folder content is also disabled.

If an entry is disabled, the disabled icon appears beside the entry to indicate that it is disabled.

If the source entry is disabled, all shortcuts to the entry appear with the source disabled icon , indicating that it no longer works.

You must have read and write permissions for an entry (p. 191) to enable or disable it. You must also have traverse permissions on the folder that contains the entry.

Steps

1. In Cognos Connection, locate the entry you want to disable and, in the **Actions** column, click the set properties button .

2. Click the **General** tab.
3. Select the **Disable this entry** check box.

   Tip: To enable a disabled entry, clear the **Disable this entry** check box.
4. Click **OK**.

If you have only read, execute, or traverse permissions for a disabled entry, you cannot see the entry in the portal. If you have write or set policy permissions for a disabled entry, it appears in the portal with the disabled icon .

Select a Link for an Entry

Some entries are linked to other entries when they are created. For example, a report view is linked to a report and a report or agent is linked to a package. Metrics are linked to a metrics package.

You can change the link for an entry. For example, if a report is deleted, you may want to link an associated report view to a different report. After you change the link, the report view reflects the content of the new report.

Select a link that is appropriate for the entry. For example, the package that a report is linked to must contain a valid model for the report to run correctly.

If the link associated with the entry is not available, **Unavailable** appears. For example, **Unavailable** appears if the package that a report is linked to is deleted.

You must have write permissions for the entry you are attempting to select a link for. You must also have write and traverse permissions for the current folder.

Steps

1. In Cognos Connection, locate the entry you want and click the set properties button .
2. Click the **General** tab and find the current link for the entry.

   For example, for a report, look in **Package**. For a report view, look in **Source report**.
3. Click the link.

   For example, for a report, click **Link to a package**. For a report view, click **Link to report**.
4. Select the new entry that you want to link the entry to and click **OK**.

Delete an Entry

When you delete an entry, you permanently remove it from the portal and its ID is deleted. You may decide to delete an entry because it is outdated or may no longer satisfy your requirements.

Deleting the source entry for a shortcut removes only the source entry. The shortcut entries remain but have an invalid reference icon and are not accessible.

Deleting a shortcut or a report or agent view removes only the selected entry and not the source entry. References from other entries no longer work.

You must have write permissions or set policy permissions for the entry you are attempting to delete. You must also have write and traverse permissions for the current folder.

Steps

1. In Cognos Connection, select the check boxes next to the entries you want to delete.
2. Click the delete button on the toolbar.

   A confirmation box appears.
3. Click **OK**.

Specify the Order of Entries

You can specify the order of folders and entries in the portal. You may decide to organize entries by level of usage and place entries that you use daily at the top of the list.

By default, existing entries are sorted alphabetically. Entries added after the order is specified are shown at the end of the list.

To specify the order of entries, you must have read and write permissions for all entries in the folder and read and traverse permissions for the folder containing the entries.

Steps

1. In Cognos Connection, click the tab you want.
2. Click the order button on the toolbar.
3. Select the entries in the **Shown in default order** list box and click the right-arrow button to move them to the **Shown first** list box.

   Note: You specify the order of folders and entries independently.
4. Click the **Up**, **Down**, **To top**, and **To bottom** links to move the folders and entries within the list.
5. Click **OK**.

Create a Folder

You can organize entries into folders. Having folders that are logically labeled and organized helps you easily locate reports. For example, you might want to create folders in **My Folders** or **Public Folders** to help you organize your entries.

You can create folders in the following locations:

- Public Folders

Entries that are placed in Public Folders are of interest to and can be viewed by many users. When the focus is on the Public Folder tab, the content is grouped by packages or folders. Each package contains a single model and all related entries, such as folders, reports, jobs, report views, agents, metrics, URLs, and shortcuts.

- My Folders

  You create personal folders and use them to organize entries according to your preferences. My Folders are accessible by you only when you are logged on.

You must have write access to a folder to create entries in it.

Tips

- Click **More** to view a full list of actions that can be performed on an entry.
- Click **Set Properties** to change the general properties, defaults, permissions, and job properties for an entry. Not all properties are available for each type of entry.

Steps

1. In Cognos Connection, go to the location for the new folder.
2. Click the new folder button on the portal toolbar.
3. In the **Name** box, type the name of the new folder.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 231). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. If you do not want to use the target folder shown under **Location**, choose another location:
   - Click **Select another folder**, select the target folder, and click **OK**. If the folder box is empty, go back one folder level using the path at the top of the dialog box.
   - Click **Select My Folders** as the location.
6. Click **Finish**.

The new folder has the same permissions as the parent folder. For information about changing access permissions, see "Access Permissions" (p. 191).

Specify an Alternative Icon for an Entry

In the portal, the standard icons that appear next to entries help identify the class to which the entry belongs. To better identify an entry among several similar entries, you can replace the standard icon with an alternative icon.

When you specify an alternative icon, use a screen resolution of 16 x 16 pixels to ensure that the icon is properly aligned and spaced in the portal.

Customizations, such as alternative icons, are not maintained automatically. As a result, alternative icons must be ported manually upon upgrade.

Steps

1. In Cognos Connection, locate the entry you want and click the set properties button.
2. Click the **General** tab and next to **Icon**, click **Edit**.
3. Click **Specify an icon**, and in the edit box, specify a name for the image, for example, myicon.gif.

   The image must exist in the folder c8_location/webcontent/ps/portal/images.
4. Click **OK**.

Wherever the entry appears in the portal, the alternative icon appears instead of the standard icon.

Search for an Entry

You can search for entries whose name, description, or both match the string entered in the search criteria. You can find types of entries by leaving the search string empty and selecting a specific entry type in the advanced search criteria. The search ignores capitalization.

The following table shows examples of search criteria and results.

Method	Search criteria	Results
Contains the exact string	Report 1	"Report 1", "Report 100", "Copy of Report 1"
Starts with the exact string	report	"report 1", "Report 100"
Matches the exact string	Report	"Report", "report"

Entries for which you have access permissions are included in the search results.

Steps

1. Go to the highest level folder you want to include in your search.

   Tip: You can increase or limit the folders to include in your search by changing the **Scope** when you enter the search criteria.
2. Click the search button on the toolbar.
3. In the search box, type the phrase you want to search for.

4. Click **Advanced**.
5. Choose the type of match between the search string and the results:
   - To return entries that include the search string somewhere in the name or description, click **Contains the exact string**.
   - To return entries whose name or description begins with the search string, click **Starts with the exact string**.
   - To return entries whose name or description matches the search string word for word, click **Matches the exact string**.
6. In the **Type** box, click the type of entry to search for.

   Tip: To search for all shortcuts in the selected location, click **Shortcuts**.
7. In the **Modified** box, click the date that the entry was last modified.

   For example, if you want the search to return entries that were updated in the last week, click **In last week**.

   Note: If you are searching a third party namespace, this option is not available.
8. In the **Scope** box, click the folders you want to include in the search.
9. Click the **Search** button.

   The entries matching the search criteria and for which you have permissions to view appear at the bottom of the screen under **Results**.

   Tip: To open an entry, click its link.

Personalize the Portal

You can personalize the way data appears in Cognos Connection by changing your preferences. For example, you can set the product language and the preferred output format of reports.

Changes take effect immediately in the current session. The preferences are stored and used for future sessions unless you change them.

You can change the following settings:

General	Description
Number of entries in list view	The maximum number of rows that appear in a list before scrollbars are required. This applies to rows where scrolling is allowed.

General	Description
Separators in list view	The method of separating entries in lists in Public Folders and My Folders. Choose from no separator, grid lines, or alternating backgrounds. This setting applies to all lists with the exception of the output versions list. This setting is available only if you use Internet Explorer or Firefox.
Style	The uniform look and feel applied to all components of Cognos 8. You can choose from the styles available to you.
Default view	The decision to use list view or details view by default. List view shows the name, modified date, and actions. Details view shows the name, description, modified date, and possible actions. Details view works only in Public Folders and My Folders in Cognos Connection. In other components, list view is used.
Number of columns in details view	The maximum number of columns per row for the details view.
Report format	The preferred format to view the report. Choose between HTML, PDF, Delimited Text (CSV), Excel, and XML.
Automatic refresh rate in seconds	The period of time to wait before refreshing the portal interface. This setting applies only to some administrative pages.
Show a summary of the run options	The option to show a summary of the run options when a report is not run interactively.
Show the Welcome page at startup	The option to show or hide the Welcome page at the beginning of a session.
Product language	The language used by the Cognos 8 user interface. It applies to all Cognos 8 components, such as Cognos Connection, Cognos Viewer, and Report Studio.

General	Description
Content language	The language used to view and produce content in Cognos 8, such as names and descriptions of entries, or data in reports.
Time zone	The time zone used. Select the default server time zone set by your administrator. For more information, see the *Installation and Configuration Guide*. Or you can select another time zone.

Personal settings appear if you have read permissions for your account.

Personal	Description
Primary logon	The namespace and credentials that you used to log on to Cognos 8. Also shows the given name, surname, and email address if they have been defined.
Secondary logon	A list of secondary logons. The secondary logons exists if you logged on to multiple namespaces.
Alerts	Use to specify an email address for alerts. When the delivery service processes the alert list, it uses the email address specified in the **Email** box to send alerts to the user. If there is no email address specified, the email address specified in the **Primary logon** section is used.
Credentials	Authorization to other users, groups, and roles to run entries using the credentials. Click **Renew the credentials** after you change your password in your third-party namespace or to ensure that all credentials are in place if you are logged in to multiple namespaces.
Groups and roles	A list of groups and roles associated both with your primary and secondary logons.
Capabilities	A list of secured functions and features that you can use based on both your primary and secondary logons. To create trusted credentials, see "Trusted Credentials" (p. 196).

Portal tabs settings appear if you have read permissions for your account.

Portal Tabs	Description
List of entries	Represents the tabs, including Public Folders and My Folders, in your Cognos Connection environment.
Add	Use to add a tab for a specified page in Cognos Connection. Each tab represents Public Folders, My Folders, or a page.
Remove	Use to remove a tab from Cognos Connection.
Modify the sequence	Use to change the order of tabs in Cognos Connection.

Steps

1. In Cognos Connection, click **My Area**, **My Preferences**, and click the required tab.
2. Choose the appropriate settings.
3. Click **OK**.

My Watch Items

Use the **My Watch Items** area of the portal to view (p. 235) and manage watch items from a single location. Watch items include alert lists and watch rules that help you monitor business events that are important to you.

The **Alerts** tab shows the alert lists to which you belong. Use this tab to remove yourself from the alert list for a report or agent.

The **Rules** tab shows the watch rules you created in saved HTML report output. Use this tab to

- edit a watch rule (p. 235)
- enable or disable a watch rule. For information, see "Disable an Entry" (p. 226).
- organize watch rules in folders. For information, see "Create a Folder" (p. 228).
- delete a watch rule. For information, see "Delete an Entry" (p. 227).
- edit the My Watch Items page properties. For information, see "Edit a Page" (p. 240).

You can also add yourself to the alert list for a report (p. 335), add yourself to the alert list for an agent (p. 354), and create a watch rule for a report (p. 337).

The report owner must allow report users to receive alerts and create watch rules for the report.

View Watch Items

To view the alerts lists to which you belong and the watch rules you created, use the **My Watch Items** area of the portal.

You can also remove yourself from an alert list (p. 235), and edit a watch rule (p. 235).

Steps

1. In Cognos Connection, in the upper-right corner, click **My Area** , **My Watch Items.**
2. To view your alerts lists, click **Alerts**.
3. To view your watch rules, click **Rules**.

Remove Yourself from an Alert List

To remove yourself from an alert list for a report or agent, use the **My Watch Items** area of the portal.

When you are added to an alert list, you receive an email notification when the report, or report associated with the agent task, is saved. After removing yourself from an alert list, you are no longer alerted.

Tip: You can also add or remove yourself from an alert list for a report using the **Report** tab of the **Set Properties** page (p. 335). For an agent, you can use the **Agents** tab of the **Set Properties** page (p. 354).

Steps

1. In Cognos Connection, in the upper-right corner, click **My Area** , **My Watch Items**.
2. Click the **Alerts** tab, and in the **Source** column, click the alert list to remove.

   You can select multiple alert lists.
3. Click the remove me from the alert list button.
4. Click the refresh button.

   Note that the alert list is removed from the **Source** column.

Edit a Watch Rule

After creating watch rules in saved HTML report output, you can edit them from the **My Watch Items** area of the portal. For example, you can change the general properties, such as name, language, and description. You can also change the properties, such as rule condition, context, and alert type.

For information about creating a watch rule, see "Create a Watch Rule for a Report" (p. 337).

To edit a watch rule in Cognos Connection, you must have read and write permission to the **My Watch Items** page.

Steps

1. In Cognos Connection, in the upper-right corner, click the my area button , and click **My Watch Items**.
2. Click the **Rules** tab, and in the **Actions** column, click the set properties button for the watch rule you want to edit.
3. Use the **Set properties** page, **General** tab, to change the properties, such as name, language, or description for the watch rule.
4. Use the **Set properties** page, **Rule** tab, to change the properties, such as rule, context, and alert type for the watch rule.
   - To change a rule, in the **Rule** section, click the condition that appears, for example, **>** (**greater than**), click a new condition in the list, and specify a value for the condition in the box.
   - To change the context, under **For the selected context**, select the check box next to the report items you want to include.
   - To edit the alert type, under **Alert type**, select the alert type, if it is not already selected. Next to the alert type, click **Edit the options**.

Chapter 15: Pages and Dashboards

Cognos Connection pages and dashboards provide quick access to Cognos business intelligence and performance management information, such as reports, metrics, or news items. The information is relevant to specific users or business objectives, and can be monitored at a glance.

Dashboards are pages with enhanced functionality. The information is displayed on multiple tabs that are easy to navigate. Each tab can include different segment of information. A dashboards can be accessed as a standalone application through a URL. Users can print selected dashboard pages.

The content for pages and dashboards is provided by Cognos portlets, or supported third-party portlets. Each portlet is an independent application that adds to the page different content and functionality, such as the ability to browse folders and entries, view reports and metrics, and include custom text and images or links to other Web pages.

You can add different types of information to your pages and organize them in a way that is meaningful to you. For example, you may want to see specific Cognos reports and metrics, or have links to your favorite Web sites.

The following table shows the types of content you can add to a Cognos Connection page, and the portlets that provide this content.

Page Content	Portlet	Portlet Group
Browse Cognos folders, reports, and other entries	Cognos Navigator	Cognos Content
Search for Cognos reports and other entries	Cognos Search	
View and interact with Cognos reports and other entries	Cognos Viewer	
View and interact with different types of performance metrics, such as the metrics you want to monitor closely, or the metrics for which you are directly responsible.	Metric List	Metric Studio Portlets
Add a metric history chart that illustrates the historical performance of the metric	Metric History Chart	

Page Content	Portlet	Portlet Group
View and interact with custom applications created using Cognos 8 Software Development Kit	Cognos Extended Applications	Cognos Extended Applications Portlet
Register and show active links to other Web pages	Bookmarks Viewer	Cognos Utility
Add and view custom images, such as logos	Image Viewer	
Insert any other Web page	HTML Viewer	
Add and show the content of a Real Simple Syndication (RSS) news feed specified by a URL address	RSS Viewer	
Add and view custom text and images	HTML Source	
Create and view a dashboard with multiple tabs	Multi-page	Dashboard
Add non-Cognos items to a page	Supported third-party portlets	Third-party content

Note: The portlets can also be referred to as HTML fragments.

The list of pages is cached in a Cognos Connection session. When the state of a page changes during the current session, users who have access to the page are affected. For example, when a page is disabled or deleted, it can no longer be used and its tabs are deleted or not functional. To update the portal with the most current settings, use the Cognos Connection refresh button .

When you log on to Cognos Connection for the first time, you access the pages an administrator made available to you. Later, you can create your own pages.

You can perform the following page-related tasks in Cognos Connection:

- create pages (p. 239)
- edit pages (p. 240)
- share pages with other users (p. 240)
- modify portlets (p. 241)
- enable communication between portlets (p. 241)
- add, remove, or reorder the portal tabs (p. 243)

- change your home page (p. 245)

For more information about dashboards, see "Create a Dashboard with Multiple Tabs" (p. 245).

For more information about portlets, see "Deploying Cognos Portlets to Third-party Portals" (p. 403).

Create a Page

You can create your own pages in Cognos Connection to group different types of information into a single view.

The pages are saved in Public Folders or My Folders. If you plan to share a page with other users, save it in Public Folders.

After you create the page, you can edit it to modify its contents, layout and style, and to set access permissions (p. 240).

You can delete pages in Cognos Connection (p. 227) if you have the required access permissions for the pages. Deleting a page may affect your portal tabs (p. 243).

Steps

1. In Cognos Connection, click the new page button .
2. Specify a name and location for the page, and, if you want, a description and a screen tip.
3. Click **Next**.

   The **Set columns and layout** page appears.
4. Define the layout for your page by setting the number and width of columns.

   Tip: If you are using multiple columns and one of the columns includes a report that is shown in Cognos Viewer, set the width to at least 50% to minimize scrolling.
5. In the column to which you want to add portlets, click **Add**.
6. Click the portlet group that contains the portlets you want to add.
7. Select the portlets, and click the add button to move them to the **Selected entries** box. If you want to remove a portlet from the **Selected entries** box, click **Remove**.

   Tip: You can preview the content of the portlets by clicking the view this portlet button .
8. Click **OK**.
9. Repeat steps 5 to 8 for each portlet group you want.
10. Click **OK**, and then click **Next**.

    The **Set page style** page appears.
11. Customize the appearance of your page.
    - If you want, add a title and instructions for the page in the language of the product.

For more information, see "Edit a Page" (p. 240).

To hide the title or instructions, select the associated check box.

Tip: To change the formatting of the text, click **Custom**. To go back to the default formatting, click **Return to default**.

- If you want, hide the portlet borders, title bars, or the edit button in the title bar. This helps to avoid clutter and gives the page a uniform look and feel.

12. Click **Next**.
13. If you want to add the page to the portal tab bar, select the **Add this page to the portal tabs** check box. To view the page, select the **View the page** check box.
14. Click **Finish**.

Edit a Page

You can change the page content, layout and style, and access permissions. For example, you may want to see a different report, or change the list of users who can access the page.

Page Titles and Instructions

When you create a page, you can specify a title and instructions for the page only in the product language you currently use. For example, if you use the French version of Cognos 8, you can type the title and instructions in French only. After the page is created, you can add the title and instructions for other language versions by editing the page properties on the **Page Style** tab.

Steps

1. Go to the page you want to edit.
2. Click the edit page button .

   Tip: Alternatively, locate the page in Cognos Connection, and click its set properties button.
3. Change the page properties as required.

   For more information about changing the page content, layout, and style, see "Create a Page" (p. 239).

   For more information about setting the page access permissions, see "Share a Page" (p. 240).

Share a Page

You can share your page with other users by giving them access permissions for the page. You can set up the permissions so that other users can only view the page or also modify it.

To view a page, traverse and execute permissions for the page, and execute permissions for its portlets are required. To modify the page, write permissions are also required.

Steps

1. If you did not create the page in Public Folders, copy it there from your personal folders (p. 224).
2. Specify which users, groups, or roles can have read, traverse, execute, or write permissions for the page.

   For more information, see "Access Permissions" (p. 191)

Modify a Portlet

Portlets provide different types of information for pages. You can modify the content of an instance of a portlet in a page if you have the required permissions for the page(p. 240). You will retain the custom settings even if the administrator resets the portlet. If other users have access to the page that contains this portlet instance, they will also see the changes. However, if the administrator locks the portlet, you cannot configure it.

The configurable properties for the Cognos portlets vary. For more information, click the help button in the portlet title bar.

Steps

1. Go to the page that contains the portlet.
2. In the portlet title bar, click the edit button .
3. Edit the properties as required.

   Tip: If you want to go back to the default settings, click the reset button.
4. Click **OK**.

Enable Communication Between Cognos Portlets

You can enable portlet-to-portlet communication so that the portlets can interact. For example, you can use this functionality when you want to navigate published Cognos reports and view the selected reports on the same page.

This functionality applies only to Cognos portlets and works only for portlets of the same group. In each group, one portlet is a target portlet, and the remaining portlets are source portlets. The results of actions in the source portlets are shown in the associated target portlets.

Portlet-to-portlet communication can be enabled between the source and target portlets in the following portlet groups.

Group	Source portlet	Target portlet
Cognos Content	Cognos Navigator	Cognos Viewer
	Cognos Search	Cognos Viewer
	Cognos Viewer	Cognos Viewer
Metric Studio Portlets	Metric List	Cognos Viewer
Cognos Utility	Bookmarks Viewer	HTML Viewer
	Image Viewer	HTML Viewer
	RSS Viewer	HTML Viewer

To enable this functionality, you specify a channel name in the target portlet and refer to this name in the associated source portlets.

For more information about Cognos portlets, see "Deploying Cognos Portlets to Third-party Portals" (p. 403).

Steps

1. Choose the portlet group for which you want to enable portlet-to-portlet communication:
   - For the Cognos Content group, go to the page that contains the Viewer portlet, and click the edit button in the portlet title bar.
   - For the Cognos Utility group, go to the page that contains the HTML Source portlet, and click the edit button in the portlet title bar.
2. In the **Channel name** box, type the name you want.

   The name can contain letters, numbers, and underscore (_) characters, but must not contain any spaces. For example, Cognos, Cognos_Portlets, CognosPortlets are valid names.
3. Click **OK**.
4. Go to the page that contains the source portlet you want, and click the edit button in the portlet title bar.

   The source and target portlets can be in different pages.

   The portlet properties page appears.
5. Under **Open links**, in the **In a destination portlet** box, type the channel name specified for the associated target portlet in step 2.
6. Click **OK**.

Portal Tabs

The tabs in Cognos Connection are used to quickly access the pages that are important to you.

The tabs represent:

- Public Folders
- My Folders
- Pages

An administrator specifies the default tab setup for users. To personalize Cognos Connection, you can add (p. 243) and remove (p. 244) tabs, or reorder them (p. 245). Other users are not affected by your changes.

When you delete a page, the tab associated with this page is automatically removed. Your tabs may also be affected by changes to the associated pages made by other users who have access to the pages. For example, when a page is deleted during the current session, its tab is no longer functional, and an error message may appear when you click the tab. To see the most current tab settings, click the Cognos Connection refresh button .

Note: If many tabs exist, scrolling is added automatically.

Add a Tab

You can add a tab in Cognos Connection for a new page or for an existing page so that you can access the page quickly.

If the Public Folders or My Folders tabs are not available in your tab bar, you can add them, too. Only one tab can exist for each folder or page.

There are various methods to add a tab. Choose the method that is applicable to your current view.

Steps Using My Preferences

1. Click the may area button , **My Preferences**, and then click the **Portal Tabs** tab.

   A list of your current tabs appears.

2. Click **Add**.

3. In the list of available pages, select the page you want.

   You can select multiple pages.

4. Click the right arrow button to move the page to the **Selected entries** box.

5. Click **OK**.

   The tab for the page appears in the portal.

6. Click **OK** to close **My Preferences**.

Steps Using the Tab Menu

1. From the tab menu on the left side of the tab bar, click **Add tabs**.
2. In the list of available pages, select the page you want.

   You can select multiple pages.
3. Click the right arrow button to move the page to the **Selected entries** box.
4. Click **OK**.

   The tab for the page appears in the portal.

Steps Using the Add Button

1. In the list of available pages, locate the page you want.
2. In the **Actions** column, click its associated add button .

   The tab appears in the portal.

Delete a Tab

You can delete a tab when it is not needed.

When you delete a page that has a tab, the tab is automatically removed. When you remove a tab for a page, the page is not deleted.

You can delete the Public Folders and My Folders tabs, and add them back later, if needed (p. 243). Deleting the tabs does not delete Public Folders and My Folders from Content Manager.

Steps Using My Preferences

1. Click the may area button , **My Preferences**, and then click the **Portal Tabs** tab.

   A list of your current tabs appears.
2. Select the check box next to the tab you want to remove, and click **Remove this tab**.

   You can select multiple tabs.
3. Click **OK**.

   The tab is deleted from the tab bar.

Steps Using the Tab Menu

1. On the tab bar, click the tab you want to remove.
2. From the tab menu , on the left side of the tab bar, click **Remove this portal tab**.
3. In the message box, ensure you are deleting the proper tab, and click **OK**.

The tab is deleted from the tab bar.

Reorder the Tabs

You can change the order of tabs so that they are organized in a way that is meaningful to you.

Steps Using My Preferences

1. Click the may area button , **My Preferences**, and then click the **Portal Tabs** tab.

   A list of your current tabs appears.
2. Click **Modify the sequence**.
3. In the **Tabs** box, move the tabs up or down as required.
4. Click **OK**.

   The tabs appear in the new order.
5. Click **OK** to close **My Preferences**.

Steps Using the Tab Menu

1. From the tab menu on the left side of the tab bar, click **Modify the sequence of tabs**.

   A list of your current tabs appears.
2. Move the tabs up or down using the appropriate buttons.
3. Click **OK**.

   The tabs appear in the new order.

Change Your Home Page

You can choose any page in Cognos 8 as your home page.

Steps

1. Go to the page you want to set up as your new home page.
2. Next to the home icon , click the arrow, and click **Set View as Home**.

Create a Dashboard with Multiple Tabs

A dashboard is a visual display of the most important information that a user needs. The information is consolidated and arranged on a single screen so that it can be monitored at a glance.

Different segments of information are displayed on different tabs. To create a dashboard, you assemble the different segments of information into a single view by using the Multi-page portlet

(p. 237). This portlet is linked to a source folder that contains entries that appear as tabs in the dashboard. You can make changes to the tabs in the dashboard by adding or deleting the associated entries from the source folder.

The following Cognos entries can be used as tabs in a dashboard:

- folders and shortcuts to folders

  Use folders to include a second level of tabs.

- packages and shortcuts to packages

  Use packages to include a second level of tabs.

- reports and shortcuts to reports

  Use to view or run a Report Studio report.

- report views and shortcuts to report views

  Use to view or run a Report Studio report.

- queries and shortcuts to queries

  Use to view or run a Query Studio report.

- analysis and shortcuts to analysis

  Use to view or run an Analysis Studio report.

- pages and shortcuts to pages

  Use to add a page or another dashboard

- URLs and shortcuts to URLs

  Use to embed a different Web page.

- PowerPlay reports

  Use to view or run a PowerPlay report

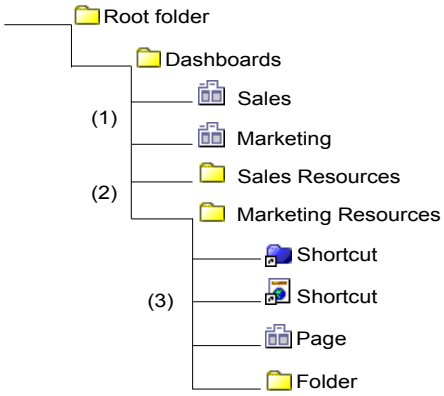
- MS Documents

  Use to include a link to a Microsoft document, such as an Excel, PowerPoint, or Word document.

The general dashboard properties are the same as page properties. You can edit the dashboard layout and style (p. 240), modify the properties of the Multi-page portlet (p. 241), set up access permissions for the dashboard (p. 240), and add it to the portal tabs (p. 243).

Setting up the Dashboard Folder Structure

Before you start creating your dashboards, we recommend setting up a folder hierarchy in Public Folders to keep your dashboard resources organized. For example, create a folder for all the dashboards you plan to create. Next, create a subfolder for each dashboard to use as source folder for the entries that you want to include in the dashboard, such as reports, folders, pages, or shortcuts. The folder structure may look like this:



1. The Sales and Marketing pages are the multi-tabbed dashboards. These are the dashboard master pages that are built using the Multi-page portlet.
2. The Sales Resources folder is the source folder for the Sales dashboard, and the Marketing Resources folder is the source folder for the Marketing dashboard.
3. The source folders can contain entries such as reports, pages, folders, shortcuts, and so on. These entries appear as tabs in the dashboard.

Steps

1. In Cognos Connection, click the new page button .
2. Type the name, and select a location for your page.
3. Click **Next**.
4. In the **Set columns and layout** page, set the number of columns to 1, and the column width to 100%.
5. Click **Add**.

   A list of portlet groups appears.
6. In the **Available Entries** box, click **Dashboard**.
7. Select the **Multi-page** portlet, and click the right arrow button to move the portlet to the **Selected Entries** box.
8. Click **OK**, and then **Next**.
9. In the **Set page style** page, specify a meaningful title for the page, select any of the remaining properties, and click **Next**.
10. In the **Select an action** page, you can select **Add this page to the portal tabs**.
11. Click **Finish**.

    The page that you created is the dashboard master page.
12. Open the page you created.

An empty frame of the Multi-page portlet appears.

13. In the portlet toolbar, click the edit button .

    The portlet properties page appears.

14. In the **Source folder for pages** section, click the **Select an entry** link.

15. Browse to the folder or package that contains the resources for the dashboard, such as shortcuts, pages, or bookmarks. Select an entry, and click **OK**.

    Tip: To add My Folders as a tab in the dashboard, create a shortcut to My Folders.

16. Specify other portlet properties as required. For example, in the **Display Style** section, specify how to display the dashboard tabs, horizontally at the top of the page, or vertically on the left side of the page.

    For more information about the portlet properties, see "Multi-page" (p. 673).

17. Click **OK**.

You can now open and view the dashboard page.

Tip: Other users can access the dashboard through its URL. To see the URL, go to Cognos Connection, locate the dashboard master page, and open its properties page. On the **General** tab, click **View the search path, ID and URL**.

Adding Interactivity to Pages and Dashboards

Pages and dashboards become much more effective for data reporting and analysis when you add interactivity to them. A single action in one report can cause other reports to refresh simultaneously and show the data associated with the action.

You can enhance the page interactivity by

- defining global filters (p. 248)
- enabling the sharing of drill-up and drill-down actions (p. 252)
- enabling the sharing of drill-through actions (p. 253)

Defining Global Filters

Global filters are used to control the display of one or more reports in a single portal page or in a dashboard. For example, a global filter can be on a report that contains only a prompt or prompt controls. This allows for a single selection to drive a number of reports at once. When a prompt answer is changed, all related reports refresh dynamically to show the data that answers the prompt. For example, if you answer a prompt for a country with Brazil, all related reports on the page are filtered to show the data for Brazil. When this is used in a dashboard, the context is passed to all corresponding tabs.

Perform the following tasks to set up a page or a dashboard with global filters:

- Prepare the Reports (p. 249)
- Create the Global Filters (p. 249)
- Assemble the Reports on a Page (p. 250)

Preparing the Reports

Before you start creating a page or a dashboard with global filters, you must know which reports you can use, and have the reports ready. The reports can be authored in Report Studio, Query Studio, or Analysis Studio.

If you include reports from only one package, the global filters share parameters using the model item. If you include reports from different packages, the following conditions must be met:

- All reports must use the same parameter name in their filter statements.

  An example of a relational filter is `Country = ?pCountryPrompt?`. An example of an OLAP slicer filter is `Great Outdoors Company].[Sales Territory].[SalesTerritory].[Country]->?pCountryPrompt?`.

  We do not recommend using the default parameter name, such as `Parameter1`.

- The Report Studio reports must follow the naming convention used in one of the other studios.

  For example, in Query Studio the convention is `[attribute name]` or `[level name]`, such as `Order_Method1`. In Analysis Studio the convention is `[hierarchy name]`, such as `Order Method`.

  Note: If the page contains only Report Studio reports, we recommend using the `p[attribute name]Prompt` convention, for example, `pCountryPrompt`.

Create the Global Filters

A global filter is a value that is shared across different reports. At least one of the reports that you are using for the dashboard needs to contain a prompt or prompt control. The prompted report is embedded into a page or a dashboard using the Cognos Viewer portlet and linked with other reports in the page using the global filter portlet properties. The prompts that are used as global filters control the display of your chosen linked reports. If this functionality is implemented in a single page, the prompts control linked reports in different sections of the page. If the page is a dashboard with multiple tabs, the prompts can control the report filtering across tabs.

We recommend creating prompt reports in Report Studio. The rich editing environment of this studio gives the author access to a variety of prompt controls, such as the **Next**, **Reprompt**, or **Finish** buttons. These controls add more interactivity to portal pages.

For more information about building prompts and prompt pages, see the Report Studio *Professional Authoring User Guide*.

Steps

1. In Report Studio, create a prompt on a report page, not on a prompt page, of the report.

   Set the **Auto-Submit** property for the prompt to **yes**.

If you want to use cascading prompts, only the last prompt in the sequence needs to be on the report page.

For some prompts, such as the value prompts, you may need to add a **Finish** button to signal that the prompt selection is complete. For cascading prompts, the **Reprompt** button is also required to restart the prompting sequence.

2. Add other details, such as background images, instructions, or a title.

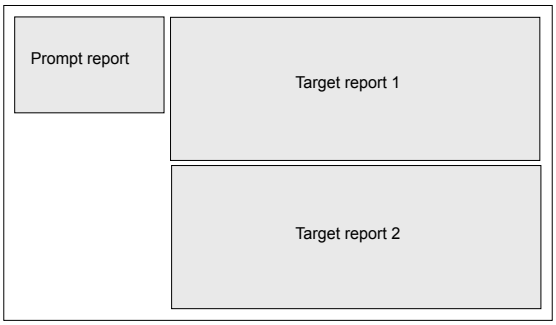
The prompt can now be added to a portal page or a dashboard (p. 250).

Assemble the Reports on a Page

The prompts and the target reports in a page or a dashboard create an interactive and easy way to access Cognos BI environment.

Each report is displayed using the Cognos Viewer portlet. The reports communicate with each other using the properties of this portlet.

You can use different design strategies to implement global filters in a page. Here is an example of a basic layout:



If your page includes reports from different packages, ensure that the prompt reports use the same parameter names as the target reports.

Use the following steps when defining global filters in a single page. If you want to implement this functionality in a dashboard, you must complete additional steps. For more information, see "Create a Dashboard with Multiple Tabs" (p. 245).

Steps

1. In Cognos Connection, click the new page button .
2. Type the name, and select a location for your page.
3. Click **Next**.
4. In the **Set columns and layout** page, set the number and width of columns.

   For example, the reports that display the prompts and prompt controls can be placed in one column, and the target reports in a separate column to the right.

5. Click **Add** at the bottom of the first column.
6. In the **Available Entries** box, click **Cognos Content**.
7. Select the **Cognos Viewer** portlet, click the right arrow button to move the portlet to the **Selected Entries** box, and click **OK**.
8. Repeat steps 5 to 7 for each column.

   You must add the Cognos Viewer portlet for each report that you want to include in the column. For example, if the column on the left will contain a prompt and prompt controls, add two Cognos Viewer portlets.
9. Click **Next**.
10. Complete the remaining steps in the wizard, if needed, and click **Finish**.

    For more information, see the steps in the section "Create a Page" (p. 239).
11. Go to the folder where you saved the new page, and open it.

    In the page columns, you can see the empty frames of the Cognos Viewer portlets.
12. For any portlet in the page, click the edit button in the portlet toolbar.
13. In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.
14. Click **Edit Properties**.

    The **Advanced Properties Editor** appears.
15. For the **Fragment Action** property, specify the default portlet action when the portlet is invoked in a page.

    You can choose to show the run icon, run the report, or view the most recent saved output.

    Tip: For more information about the portlet properties, click the **Help** button in the portlet.
16. For the **Prompt the user** property, specify how to execute the prompts.
17. For the **Prompt values** property, select the **Communicate with other portlets** check box.

    This property enables communication between this portlet and other portlets in the page that have this property set up.

    - When you select **Every time**, if the report contains optional or required prompts, the user is prompted to enter the prompt values before the report is run.
    - When you select **Only when required parameter values are missing**, the user is prompted if the report contains required prompts and the values are missing. Otherwise the report runs successfully.
    - When you select **Never and show the report only when required values are provided**, Cognos Viewer attempts to run the report, but the page remains hidden until the required prompt values are provided.

- When you select **Based on the prompt settings of the report**, Cognos Viewer uses the prompts specified in the report.

18. If you want to set up communication between only specific portlets in the page, type the channel name in the box provided.

    Only the portlets that share the same channel name can interact. By specifying the channel name, you have more control over the page. For example, you can link only the reports that have matching parameters.

    For more information about this property, click the **Help** button in the portlet.

19. If you want to see the portlet toolbar in the page, for the **Show Toolbar** property, select the **Normal mode** and **Maximized mode** check boxes.

20. Click **OK** to close **Advanced Properties Editor**, and click **OK** again to close the general properties page.

21. Repeat steps 12 to 20 for each portlet in the page.

Enable Sharing of Drill-up and Drill-down Actions

In pages, you can enable sharing of drill-up and drill-down actions, between reports that are based on a dimensionally modelled data source. A drill action on an item in one report causes the same action in an associated report if the report is on the same page and contains the same item. For example, when you drill down on the item 2005 in one report, all reports in the page drill down on the same item and the data for the year 2005 appears in all reports.

This functionality is enabled using the properties of the Cognos Viewer portlet. By default, drill actions are disabled in a page.

This functionality is not supported for dashboards with multiple tabs. However, a single page with drill-up and drill-down actions enabled can be embedded into a dashboard as one of the tabs.

Steps

1. In Cognos Connection, create a page that contains the Cognos Viewer portlet for each report that you want to add to the page.

   For more detailed information, see the steps in "Create a Page" (p. 239).

2. Configure the Cognos Viewer portlets to display the reports that you want to add to the page.

   In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.

3. In the **Advanced Properties Editor** of the Cognos Viewer portlets, for the **Drill down and drill up** property, select the **Communicate with other portlets on the page** check box.

   This property enables communication between all portlets in the page using the default channel.

   For more information, click the **Help** button in the portlet.

4. If you want to set up communication between only specific portlets in the page, type the channel name in the box provided.

   Only the portlets that share the same channel name can interact. By specifying the channel name, you have more control over the page.

Enable Sharing of Drill-through Actions

You can enable sharing of drill-through actions in a page. When a user drills from a source report to a target report, the target report appears in the specified area of the page.

For this feature to work, a page must have a report that contains an authored drill-through path. The page must also contain a placeholder Cognos Viewer portlet that is set up to receive the drill-through requests.

Report-based drill-through works with both interactive reports and saved report outputs. However, it only works for a single drill-through request. If the drill-through contains multiple targets, it must be invoked from the context menu.

This functionality is enabled using the **Channel** property of the Cognos Viewer portlet. You must specify the same channel name for the portlet that contains the source report and the portlet that receives the target report. By default, drill-through actions are disabled in a page.

This functionality is not supported for dashboards with multiple tabs. However, a single page with drill-through actions enabled can be embedded into a dashboard as one of the tabs.

Steps

1. In Cognos Connection, create a page that contains the Cognos Viewer portlets for the drill-through source report, and the target report.

   For more detailed information, see the steps in the section "Create a Page" (p. 239).

2. Configure one of the Cognos Viewer portlets to display the Report Studio source report that contains the drill-through path.

   In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.

3. Configure the other Cognos Viewer portlet to display the drill-through target report.

   As the target report, we recommend using a report that contains prompts.

   In the portlet properties page, click **Select an entry** to select the report you want to display in the portlet.

4. For both portlets configured in step 2 and 3, in the **Advanced Properties Editor** page, for the **Report-based drill-through** property, select the **Communicate with other portlets on the page** check box, and type the channel name in the box provided.

   The channel name is mandatory.

   For more information about this property, click the **Help** button in the portlet.

Chapter 16: Activities Management

You can manage Cognos 8 activities from **My Activities and Schedules** in Cognos Connection.

You can view a list of your activities that are current, past, upcoming on a specific day, or scheduled. You can filter the list so that only the entries that you want appear. A bar chart shows you an overview of activities.

You can set run priority for entries (p. 262). You can also view the run history for entries (p. 264), specify how long to keep run histories (p. 266), and rerun failed entries (p. 266).

As an administrator, you can use **Cognos Administration** to manage activities for all entries, not just your own. You can see who ran each entry and perform actions on entries as required. For example, you may want to cancel a user's large job if it is holding up important entries in the queue. You can also override the priority of an entry instance or you can change it permanently for an entry itself (p. 262).

If you switch views, you must refresh to see current data. For example, if you switch from **Past Activities** to **Upcoming Activities**, you must refresh to see current data in the panes.

You must have the Scheduling capability to access **My Activities and Schedules**.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Manage Current Activities

Current activities are entries that are currently being processed in Cognos 8. Each entry is listed by name and shows the request time and the status, and the priority for background activities. The bar chart shows the total number of entries, broken down by the number of pending, executing, waiting, and suspended entries.

In **Cognos Administration**, the user who ran the entry is also listed. You can sort the **Request time** and **Status** columns. You can choose to view a list of background activities or interactive activities.

You can suspend background entries and release them later when you want them to run. You can permanently cancel runs for entries that have one of the following statuses:

- pending in the queue
- executing
- suspended
- waiting for a process external to Cognos 8 to complete

You can filter the entries to display only those you want. In **My Activities and Schedules**, you can choose to display only those entries with a specific status or priority, or entries of a specific type or scope.

In **Cognos Administration**, for interactive current entries, you can filter by status and the dispatcher where the activity is running. For background current entries, you can filter by status, priority, type, scope, user who ran the entry, user who owns the entry, and dispatcher.

If you cancel an entry that contains other entries, such as a job or an agent, steps or tasks that have not yet been completed are cancelled. However, steps or tasks that have already completed remain completed.

You can change the priority of entries (p. 262) and view the run history (p. 264).

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button , and click **My Activities and Schedules**, **Current Activities**.
3. In the **Filter** menu, click the filtering items that you want to use.
4. Click **Apply**.

   The list shows the entries that you selected.
5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Cancel the run	
Suspend the run	
Release suspended entries	
Set entry priority	

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.

3. Click the **Status** tab, and then click **Current Activities**.
4. Click **Background activities** or **Interactive activities**.
5. From the **Filter** menu, click the filtering items that you want to use.
6. Click **Apply**.

   The list shows the entries that you selected.
7. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Cancel the run	
Suspend the run	
Run suspended entries	
Set entry priority	

Manage Past Activities

Past activities are entries that have finished processing in Cognos 8.

Each entry is listed by name and shows the request time and the status. You can sort the **Request time** and **Status** columns. The bar chart shows the total number of entries, broken down by status. If an entry has failed, a button appears showing the severity of the error.

In **Cognos Administration**, the user who ran the entry is also listed.

You can filter the entries to display only those you want. In **My Activities and Schedules**, you can choose to view a list of activities that occurred over a specified length of time, such as the last four hours or the last day, or you can specify a date or time range. You can filter by status, type, and scope.

In **Cognos Administration**, you can also filter by the user who ran the entry, the user who owns the entry, and the dispatcher where the activity ran.

You can view the run history (p. 264).

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button and click, **My Activities and Schedules**, **Past Activities**.
3. From the **Filter** menu, click the filtering items that you want to use.

   Tips: If you want to use advanced filtering options, click **Advanced options**. To reset all selections to the default settings, click **Reset to default**.
4. If an error occurred when the entry ran, pause over the error button next to the status to see the severity of the error.
5. Click **Apply**.

   The list shows the entries that you selected.
6. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, click one of the following buttons on the toolbar.

Goal	Button
Show entry details	
Hide entry details	

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click **Past Activities**.
4. From the **Filter** menu, click the filtering items that you want to use.

   Tips: If you want to use advanced filtering options, click **Advanced options**. To reset all selections to the default settings, click **Reset to default**.
5. Click **Apply**.

   The list shows the entries that you selected.
6. If an error occurred when the entry ran, pause over the error button to see the severity of the error.

7. To perform an action on an individual entry, click the arrow to the right of the entry to display the Actions menu and then select the action. To perform an action on several entries, click one of the following buttons on the toolbar.

Goal	Button
Show entry details	
Hide entry details	

Manage Upcoming Activities for a Specific Day

You can choose to view a list of all upcoming activities that are scheduled for a specific day. Each entry is listed by name and shows the request time, the status, and the priority. A bar chart shows an overview of activities broken down by scheduled and canceled items.

In **Cognos Administration**, each entry also indicates the user who scheduled it.

You can cancel scheduled runs of entries, reschedule entry runs that have been cancelled, and set priorities.

You can filter the entries to display only those you want. You can choose the day for which you want to view upcoming activities. You can filter by status, priority, type, and scope.

In **Cognos Administration**, you can also filter by the user that scheduled the entry and the entry owner.

You can also change the priority of an entry in the queue. (p. 262)

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button and click **My Activities and Schedules**, **Upcoming Activities**.
3. From the **Filter** menu, click the filtering items that you want to use and click **Apply**.
4. Click **Apply**.

   The list shows the entries that you selected.
5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Cancel the run	
Re-schedule a run that was cancelled	
Set entry priority	

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click **Upcoming Activities**.
4. From the **Filter** menu, click the filtering items that you want to use and click **Apply**.
5. Click **Apply**.

   The list shows the entries that you selected.
6. To perform an action on an individual entry, click the arrow to the right of the entry to display the Actions menu and then select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Cancel the run	
Re-schedule a run that was cancelled	
Set entry priority	

Manage Scheduled Activities

You can choose to view a list of scheduled entries. Each entry is listed by name, status, and priority. A bar chart shows you an overview of activities broken down by enabled and disabled schedules.

In **Cognos Administration**, the date and time the schedule was modified and the user who scheduled it are also listed.

You can filter the entries to display only those you want. You can choose to display only those entries with a specific status or priority, or entries of a specific type or scope.

In **Cognos Administration**, you can also filter by the user that scheduled the entry and by the entry owner.

You can set properties, run the schedule once, disable and enable scheduled entries, modify the schedule, remove the schedule, set the priority (p. 262), and view the run history (p. 264). Depending on the entry, you may also be able to perform other functions, such as view outputs or event lists.

For more information on schedules, see (p. 269).

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button , and click **My Activities and Schedules**, **Schedules**.
3. From the **Filter** menu, click the filtering items that you want to use and click **Apply**.
4. Click **Apply**.

   The list shows the entries that you selected.
5. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Enable the schedule	
Disable the schedule	

Goal	Button
Set entry priority	

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click **Schedules**.
4. From the **Filter** menu, click the filtering items that you want to use and click **Apply**.
5. Click **Apply**.

   The list shows the entries that you selected.
6. To perform an action on an individual entry, click the arrow to the right of the entry and select the action. To perform an action on several entries, select the check box for the entries you want and then click one of the following buttons on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

Goal	Button
Show entry details	
Hide entry details	
Enable the schedule	
Disable the schedule	
Set entry priority	

Manage Entry Run Priority

Scheduled entries can be assigned a priority from 1 to 5. For example, an entry with priority 1 runs before an entry with priority 5. If there is more than one entry with the same priority, the one that arrived in the queue first runs first. The default priority is 3.

Interactive entries always run immediately and priority cannot be changed once they are running.

You set the priority for an entry when you schedule it (p. 270). When an entry is in the current, upcoming, or scheduled queue, you can change the priority.

You may want to set a low priority for entries that take a long time to run so that other entries in the queue are not delayed.

When you schedule a job (p. 271), you set the priority for the whole job, not for individual entries within the job. You may want to set a low priority for a job with many entries so that other entries in the queue are not delayed.

You schedule priority for the parent job. When the job runs, all the child entries inherit the priority of the parent. When the job is in the queue and is not yet running, you can update the priority. You cannot do this for the individual entries in the job. Changing the priority of the job changes the priority of all its child entries. You can view the run history of a job (p. 264) while it is executing and see which of its entries have completed, are executing, or are pending.

The priority of entries in the queue does not affect an entry that is already running. That entry completes and then the queue priority is checked for the next entry to run.

Tip: You can change priority of entries based on filtered options. For example, to change the priority of all entries run by Joan Jackson, select her from **Ran by** under **Filter**. Then you can select all of the displayed entries and change the priority for all of them at the same time.

You must have the Scheduling capability to access manage entry run priority.

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button , and click **My Activities and Schedules** and then click **Current Activities**, **Upcoming Activities**, or **Schedules**.
3. To change the priority for one entry, click the arrow to the right of the entry and select **Set Priority**. To change the priority of more than one entry, select the check box for the entries you want and then click the set priority button on the toolbar.

   Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.
4. From the menu, click the priority that you want, and then click **OK**. If you selected one entry, the current priority of the entry appears in the **Set the priority** box. If you selected multiple entries, the **Set the priority** box contains (**Multiple**).

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click **Upcoming Activities** or **Schedules**.
4. To change the priority for one entry, click the arrow to the right of the entry and select **Set Priority**. To change the priority of more than one entry, select the check box for the entries you want and then click the set priority button on the toolbar.

Tip: To select all entries, click the check box in the upper left-hand corner, next to **Name**.

5. From the menu, click the priority that you want, and then click **OK**. If you selected one entry, the current priority of the entry appears in the **Set the priority** box. If you selected multiple entries, the **Set the priority** box contains (**Multiple**).

The new priority appears in the **Priority** column next to the entries that you selected.

View the Run History for Entries

Sometimes entries are scheduled to run in the background, without anyone waiting to view them. This includes scheduled entries, entries that are run once and saved, and interactive entries that are saved or mailed. Interactive entries do not have run histories.

Cognos 8 keeps history information each time an entry runs in the background. The run history for an entry includes information such as the request time, start time, completion time, and whether the report ran successfully.

You can look at a more detailed run history for the entry, which includes general, error, and warning messages related to the entry and any actions you can take. If there is email associated with the entry, the status of the email delivery is included.

Some types of entries display additional information in the detailed run history page:

- For reports, a report output version (p. 333) is kept each time a report is run according to a schedule. You can view the report output version from the detailed run history.
- For jobs, you can view a list of job steps and see a detailed run history for each one. You can also see the parts of the job that have not yet completed. If the entry is part of a parent entry, you can view the parent entry that initiated the run.
- For deployment export and import entries, you can view the public folders content.

  You may see the following message: Only progress information is currently available. The information will be updated following the completion of the parent activity.

  This means that the deployment has completed but the parent activity is still running. Once the final completion information is obtained from the Content Manager, the message no longer appears.
- For data movement, you can view nodes that were executed as part of a data movement entry. For more information about nodes, see the Data Manager *User Guide*.

You can rerun failed entries (p. 266) from the detailed run history page. You can view a list of related runs that are part of the rerun series and see a detailed run history for each one. You can specify how many run history occurrences to keep or for how long to keep them (p. 266).

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button , and click **My Activities and Schedules**.

3. Click **Schedules** or **Past Activities**.
4. Next to the entry, click the arrow and then click **View run history** .
5. If you want, select the **Status** of entries that you want to view.

   A list of selected entries appears.
6. If you want to view the run history details, in the **Actions** column, click the view run history details button next to the entry you want. Then, if you want, from the **Severity** list, select the severity of the entries.
7. If there is a report output version, in the **Actions** column, click the view outputs button for the entry you want. Then, from the **Versions** list, click the version you want. To delete a version, click **Manage versions** click the check box for the version, and then click **Delete**.

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click **Schedules** or **Past Activities**.
4. Next to the entry, click the arrow and then click **View run history**.
5. If you want, from the **Status** list, click the status of entries that you want to view.

   A list of selected entries appears.
6. If you want to view the run history details, in the **Actions** column, click the view run history details button next to the entry you want. Then, if you want, from the **Severity** list, select the severity of the entries.
7. If there is a report output version, in the **Actions** column, click the view outputs button next to the entry you want. Then, from the **Versions** list, click the version you want. To view the version in Cognos Viewer, click the version you want to view. To delete a version, click **Manage versions**, click the check box for the version, and then click **Delete**.
8. If there is a log file associated with the entry and you want to view it, click the view the log file button.
9. If you want to view messages, click an item with a link in the **Messages** column.

   Tip: Messages are nested. There may be child messages within child messages. If a message is displayed as a link, you can continue to drill down through the child messages.

Specify How Long to Keep Run Histories

You can keep run histories for a specific number of runs or for a specific number of days or months. For example, you can keep the run histories for the ten latest runs (occurrences) or for the past two days or six months. You can also choose to keep all run histories.

You must have read and write permissions for the entry and read or traverse permissions for the folder that contains the entry.

Tip: If you are an administrator, you can also set how long to keep run histories for entries in **Cognos Administration** from **Set properties** on the Actions menu next to the entry.

Steps in Cognos Connection

1. Click the set properties button next to the entry you want.
2. On the **General** tab, under **Run history**, choose the retention method and type the value:
   - To keep run histories for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of run histories, set this value to 0.
   - To keep run histories for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.
3. Click **OK**.

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. Click the **Status** tab, and then click the type of entries you want to view.
4. Next to the entry, click the arrow and then click **Set properties**.
5. On the **General** tab, under **Run history**, choose the retention method and type the value:
   - To keep run histories for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of run histories, set this value to 0.
   - To keep run histories for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.
6. Click **OK**.

Rerun a Failed Entry Task

When an entry, such as a report, agent task, or job runs according to a schedule or runs in the background and the entry fails, you can resubmit the failed entry with the same options that were specified in the original run.

For a job that contains steps that ran successfully and steps that did not run successfully, you are not required to rerun the entire job, but can run the job steps individually. If the job steps are run sequentially, you can rerun the job starting with the failed job step. If you wish, you can select which steps to rerun and skip the failed steps. However, the selected job steps run sequentially and if a step fails, then the steps that occur after the failed step are not run.

When you rerun a job step individually, a new run history that includes only the single job step is created for the parent job. For more information about run histories, see "View the Run History for Entries" (p. 264).

When rerunning an agent entry, associated tasks, such as an email that sends report output to a list of email recipients, are also rerun if they failed initially. If there are two associated tasks running in parallel and one task fails and one succeeds, rerunning the agent only reruns the failed task. However, if tasks are selected to run on failure, they are run again when the rerun fails.

Although the run history shows entries that ran successfully, you cannot rerun an entry that succeeded. The run options are not stored for these entries.

A rerun can fail when a task associated with a failed entry is deleted or updated.

You must have execute permission to rerun a failed task.

Steps in Cognos Connection

1. Start Cognos Connection.
2. In the upper-right corner, click the my area button , and click **My Activities and Schedules**, **Past Activities**.
3. Next to the entry, click the arrow and then click **View run history details** .

   The **View run history details** page shows run details, such as start time and completion time, run status, and error messages for a failed run. Other information that appears in the page depends on whether the entry is for a single task, a job with multiple steps, or an agent with tasks. For example, if it is a single task, the report options and the report outputs appear. If it is a job with multiple steps, a **Job** section appears with the run details of the job steps.
4. Under **Status**, next to **Failed**, click **Rerun**.
   - If the rerun task is a single task, you receive a message asking you to confirm the rerun.
   - If the rerun task is a job with multiple job steps or an agent with tasks, the **Rerun** page appears. Select the check box next to the entries you want to rerun.

   Tips: You can also rerun failed entries by clicking **Rerun** in the **Outstanding to complete** section. To rerun a single job step, in the **Job** section, in the **Actions** column, click the view run history details button for the failed step.

Steps in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.

3. Click the **Status** tab, and then click **Past Activities**.
4. Next to the entry, click the arrow to view the Actions menu and then click **View run history details** .

   The **View run history details** page shows run details, such as start time and completion time, run status, and error messages for a failed run. Other information that appears in the page depends on whether the entry is for a single task, a job with multiple steps, or an agent with tasks. For example, if it is a single task, the report options and the report outputs appear. If it is a job with multiple steps, a **Job** section appears with the run details of the job steps.
5. Under **Status**, next to **Failed**, click **Rerun**.
   - If the rerun task is a single task, you receive a message asking you to confirm the rerun.
   - If the rerun task is a job with multiple job steps or an agent with tasks, the **Rerun** page appears. Select the check box next to the entries you want to rerun.

   Tips: You can also rerun failed entries by clicking **Rerun** in the **Outstanding to complete** section. To rerun a single job step, in the **Job** section, in the **Actions** column, click the view run history details button for the failed step.

Chapter 17: Schedule Management

You can schedule Cognos 8 entries to run at a time that is convenient for you. For example, you may want to run reports or agents during off hours when demands on the system are low. Or you may want to run them at a regular weekly or monthly interval.

If you have administrator privileges, you can also schedule tasks that:

- maintain your content store
- import or export entries from a deployment archive
- run jobs
- run metrics maintenance

You can schedule entries to run at specified intervals. You can schedule entries individually (p. 270) or use jobs to schedule multiple entries at once (p. 271). Jobs have their own schedules independent from report schedules.

You can schedule entries to run on the last day of each month (p. 271). You can also schedule entries to be triggered by occurrences, such as database refreshes or emails (p. 274).

Only one schedule can be associated with each entry. If you require multiple schedules for a report or agent entry, you can create report views (p. 324) or agent views (p. 353) and then create a schedule for each view.

After you create a schedule, the entry or job runs at the time and date specified. You can then view the scheduled entries and manage them. For more information, see "Activities Management" (p. 255).

Prompts in Scheduled Entries

If an entry that contains prompts is scheduled, you must save the prompt values or specify default values (p. 331) to ensure that values exist when the report runs according to the schedule.

In a job, you can specify prompt values for job steps. When an entry runs as part of a job, the prompt values saved in the job definition are used instead of the values saved with the entry. If no values are specified in the job definition, Cognos 8 uses the values saved in the entry.

Priority for Scheduled Entries

When you schedule an entry, you may be able to select a run priority from 1 to 5. For example, an entry with priority 1 runs before an entry with priority 5. If there is more than one entry with a specific priority, the one that arrived in the queue first runs first. The default is 3. If you do not have permissions for entry priorities, the priority appears but you can not change it.

When you schedule a job, you can set priority for the whole job only, not for individual entries within a job. However, you can change the priority of individual entries when they are pending in the queue.

The priority of entries in the queue does not affect an entry that is already running. The running entry completes and then the queue priority is checked for the next entry to run.

For more information, see "Manage Entry Run Priority" (p. 262).

Run Histories for Scheduled Entries

Cognos 8 keeps history information each time a scheduled entry runs. You can use the run history for an entry to see the times at which it ran and whether the it ran successfully . For more information, see "View the Run History for Entries" (p. 264).

Schedule an Entry

You schedule an entry to run it at a later time or at a recurring date and time. For example, you can schedule a report or an agent.

If you no longer need a schedule, you can delete it. You can also disable it without losing any of the scheduling details. You can then enable the schedule at a later time. For more information, see "Activities Management" (p. 255).

You can schedule an entry to run on the last day of each month (p. 271) or as part of a job (p. 271). You can schedule reports based on trigger occurrences (p. 274).

To schedule an entry, you need the permissions that are required to run the entry. For example, to schedule a report or report view, you must have read, write, execute, and traverse permissions for it. To schedule a child report view, you must have execute permissions on the parent report. You also require the following access permissions for any data sources used by the report:

- dataSource - Execute and Traverse
- dataSourceConnection - Execute and Traverse

  With only Execute access, you are prompted to log on to the database.
- dataSourceSignon - Execute

To set priority for an entry, you must have the required permissions for the **Scheduling priority** secured feature. See "Secured Functions and Features" (p. 199).

Steps

1. Click the schedule button for the entry you want to schedule .
2. Set the priority for the scheduled entry.

   Select a lower number for higher priority. The default is 3.
3. Under **Frequency**, select how often you want the schedule to run.

   The **Frequency** section is dynamic and changes with your selection. Wait until the page is updated before selecting the frequency.
4. Under **Start**, select the date and time when you want the schedule to start.

5. Under **End**, select when you want the schedule to end.

   Tip: If you want to create the schedule but not apply it right away, select the **Disable the schedule** check box. To later enable the schedule, clear the check box.

6. If additional options are available on the **Schedule** page, specify what you want.

   For example, for reports, you can select formats, languages, delivery method (including how to save report output files), and prompt values. For more information, see "Reports and Cubes" (p. 317).

7. Click **OK**.

A schedule is created and the report runs at the next scheduled time.

Example - Schedule an Entry on the Last Day of the Month

You want to schedule a financial report to run automatically on the last day of each month for the next year.

Steps

1. Click the schedule button for the entry you want to schedule .
2. Under **Frequency**, select **By Month**, and then select **Day**.
3. Enter **Day** 31 **of every** 1 **month(s)**.

   Entering 31 as the day ensures that the entry runs on the last day of the month, regardless of how many days are in the month.

4. Under **Start**, select the last day of the current month as the day you want the monthly schedule to start.
5. Under **End**, select the last day of the same month next year as the day you want the monthly schedule to end.
6. Click **OK**.

Use Jobs to Schedule Multiple Entries

You can set the same schedule for multiple entries by creating a job. A job identifies a collection of reports, report views, and other jobs that are scheduled together and share the same schedule settings. When a scheduled job runs, all the entries in the job run.

Tip: If a job item is unavailable, you can select a different link by clicking **Link to an entry**.

Jobs contain steps, which are references to individual reports, jobs, and report views. You can specify whether to run the steps all at once or in sequence.

- When steps are run all at once, all the steps are submitted at the same time. The job is successful when all the steps run successfully. If a step fails, the other steps in the job are unaffected and still run, but the job has a **Failed** status.

- When the steps are run in sequence, you can specify the order in which the steps run. A step is submitted only after the preceding step runs successfully.You can choose to have the job stop or have the other steps continue if a step fails.

You can schedule a job to run at a specific time, on a recurring basis, or based on a trigger, such as a database refresh or an email (p. 274).

The individual reports, jobs, and report views in steps can also have individual schedules. Run options for individual step entries override run options set for the job. You can set run options for the job that serve as the default for step entries that do not have their own run options.

You can run reports to produce outputs based on the options that you define, such as format and language.

You can also include content store maintenance and deployment imports and exports in a job. For more information, see "Maintain the Content Store" (p. 118) and "Deployment" (p. 277).

Cached Prompt Data

For reports that prompt for values each time that the report is run, you may want to use cached prompt data. Reports run faster because data is retrieved from the cache rather than from the database.

The cache is used only when a requested language is the same as one in the cache. For example, the cache contains data for English, English (United States), and German (Germany). When prompted, you request English (United States) for the report. There is an exact match and the cached data is used. The cached data is also used when there is a partial match. If you request English (Canada), the cached data for English is used. If you request German (Austria), there is no match and the cached data is not used.

You can use caches for reports or report views. For report views, the report view cache is used first. If no report view cache is found, the cache for the associated report is used.

You must use a job to create or refresh a cache. You can refresh the cache automatically by scheduling the job to run periodically. If you want to use live data the next time that you run the report, you can clear the cache.

Permissions

Permissions required to include an entry as part of a job vary depending on the type of entry. The permissions are the same as for scheduling an entry (p. 270).

Steps

1. Click the new job button .
2. Type a name and, if you want, a description and screen tip for the job, select the location in which to save the job, and then click **Next**.

   The **Select the steps** page appears.
3. Click **Add**.

4. Select the check boxes for the entries you want to add and click the right arrow button .

   Tip: You can also click **Search**, and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. When you find the entry you want, click the right arrow button to list the entry in the **Selected entries** box and click **OK**.

   When the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.

5. If you want to change run options for an individual entry when it runs as part of the job, click the set icon , click **Produce report outputs**, select the **Override the default values box**, make the changes, and click **OK**.

   Tip: To return to defaults for individual entries, click the delete button.

6. If you want to refresh the cache for a report when the job runs, click the edit icon next to the report, and then from the **Run the report to** menu, click **Refresh the report cache**. Click **Override the default values**. To accept the displayed language, click **OK**. To change the language, click **Select the languages**, select the languages you want, and then click **OK**. Click **OK** to accept the displayed languages.

   Tip: To clear the cache, click the delete button.

7. If you want to create or refresh the cache, click the set icon, click **Refresh the report cache**, select the **Override the default values box**, add languages, if you want, and click **OK**.

   Tip: To clear the cache, click **More** next to the report whose cache you want to clear, click **Clear the cache**, and click **OK** twice.

8. Under **Submission of steps**, select whether to submit the steps **All at once** or **In sequence**.

   If you select **In sequence**, the steps are executed in the order they appear in the **Steps** list. If you want the job to continue to run even if one of the steps fails, select the **Continue on error** check box.

   Tip: To change the order, click **Modify the sequence**, make the changes, and click **OK**.

9. If you want to specify default run options at the job level, under **Defaults for all steps**, click **Set**.

10. If you want to override defaults, select the category and select the **Override the default values** check box and select the default options you want for the job and click **OK**.

11. Select the action you want:

    - To run now or later, click **Run now or at a later time** and click **Finish**. Specify the time and date for the run. Click **Find only** or **Find and fix**, then click **Run**. Review the run time and click **OK**.

- To schedule at a recurring time, click **Schedule to run at a recurring time** and click **Finish**. Then, select frequency and start and end dates. Click **Find only** or **Find and fix**, then click **OK**.

  Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see "Activities Management" (p. 255).

- To save without scheduling or running, click **Save only** and click **Finish**.

A job is created and will run at the next scheduled time.

Trigger-based Entry Scheduling

You can schedule entries based on an occurrence, such as a database refresh or an email. The occurrence acts as a trigger, causing the entry to run. For example, you may want to run a report every time a database is refreshed.

Trigger-based scheduling may be used to run entries automatically based on an occurrence. It may also be used to limit when users can run entries. For example, in a warehouse environment where the database is refreshed only once a week, there is no need to run reports more frequently.

You can choose to schedule the report based on the database refresh so that the report runs only once a week.

Trigger-based scheduling applies only to the entry, not to any entry view associated with it. For example, if trigger-based scheduling applies to a report, it does not apply to report views associated with the report. However, you can schedule a report view using a trigger.

Setting Up Trigger-based Scheduling

To schedule an entry based on an occurrence and confirm trigger-based scheduling, you must have read, write, execute, and traverse permissions. You also require the following access permissions for all data sources used by the entry.

Data source	Permissions
dataSource	Execute and Traverse
dataSourceConnection	Execute and Traverse With only Execute access, you are prompted to log on to the database.
dataSourceSignon	Execute

Before setting up trigger-based scheduling, ensure that your credentials exist and are up to date.

Tip: Click the my area button , **My Preferences**, and, on the **Personal** tab, click **Renew the credentials**.

Follow this process to set up trigger-based scheduling:

- Schedule an entry based on the occurrence (p. 275).
- Have your administrator set up the trigger occurrence on a server.

Trigger occurrences can also be set up by an SDK developer using the Cognos 8 Software Development Kit (SDK). For more information, see the *SDK Developer Guide*.

For information on setting up the trigger occurrence on a server, see (p. 490). You can also disable trigger-based scheduling, see (p. 489).

Schedule an Entry Based on an Occurrence

As part of setting up trigger-based scheduling, you must schedule an entry based on an occurrence.

Steps

1. Click the schedule button next to the entry you want to schedule.
2. Under Frequency, click the **By Trigger** tab.
3. In **Trigger name**, type the name of the trigger occurrence.

   Note: The trigger name that you enter may be provided to you by your administrator or developer. If not, you must inform your administrator or developer of the trigger name that you use.
4. The default start date is "now", and the default end date is "forever", which means the trigger schedule will always run when the trigger is fired (either from trigger.bat or from an SDK app) . If you put in a valid start and end date, the trigger schedule can only be fired between those dates.
5. Click **OK**.

Chapter 18: Deployment

Deployment involves moving applications from one installation to another. In Cognos 8, you deploy packages, top-level folders, or the entire content store from a source environment to a target environment.

Typically, deployment transfers entries, such as folders, reports, and report views, from a development environment to a test environment and then to a production environment. You can also deploy between operating systems.

It is important to plan your deployment to ensure that you deploy the correct information and that you do not disturb the target environment. It is also important to consider security in the source and target environments.

You can upgrade entries from previous releases, by running the deployment import wizard. For more information, see "Import to a Target Environment" (p. 298).

You can use an operating system or scripting mechanism to perform deployment from a command line. You can use the Cognos 8 software development kit (SDK) to automate the deployment process to

- create, update, and delete a deployment specification
- load a deployment specification from a deployment archive
- submit deployment export and import requests
- access deployment history

For more information, see the Cognos 8 *Developer Guide*.

Deployment Specifications

A deployment specification is an entry in the content store that defines the

- entries to be deployed
- deployment preferences
- name of the deployment archive

There are two types of deployment specifications. Export specifications are created in the source environment and control the creation of deployment archives. Import specifications are created in the target environment and control the import of entries from the deployment archive.

You can view the deployment history for each deployment specification to see the date, time, and details of the import or export.

Deployment Archives

A deployment archive is a compressed file that contains the actual entries that are deployed. A deployment archive is created when you export from the source environment. If you export to an existing deployment archive, the contents of the archive are overwritten.

You move the deployment archive from the source environment to the target environment. Then you import from the deployment archive into the target environment.

To move a deployment archive, you need access to the installation directories on the computer where Cognos 8 is installed. This location is set in the configuration tool. The default location is *c8_location*/deployment. For information about changing the location, see the Cognos 8 *Installation and Configuration Guide*.

Deployment Planning

When you deploy, you must consider how to handle security and whether to deploy the entire content store or to deploy selected packages, folders, and directory content. Other considerations relate to the database vendor, bursting reports and ownership of entries.

To avoid breaking references in the target environment, you must deploy all entries that refer to entries in another package or folder. Entries to consider include:

- jobs, shortcuts, and report views
- memberships and entry permissions

Security and Deployment

Before you deploy, you must consider access permissions (p. 278), security of deployment archives (p. 279), and references to third-party namespaces (p. 279).

Access Permissions

The entries that you deploy may have security applied to them, such as access permissions (p. 191) that specify which users and groups can access them. If you deploy the entire content store (p. 280), all access permissions are deployed. If you deploy selected packages, public folders and directory content, you can choose whether to deploy access permissions (p. 281).

Consider the following:

- Referenced users and groups

  If you deploy access permissions to a target environment, the referenced users and groups must exist in the target environment.

- Access permissions rules

  For access permissions to work after entries are deployed, the source environment and the target environment must use the same authentication provider with the same configuration. Otherwise, the permissions may not work after deployment.

Use the Cognos namespace to ensure that the permissions from the source environment work in the target environment. For example, in the source environment, create Cognos groups with the group Everyone as a member, and then set access permissions for the groups. After deployment, in the target environment, map the Cognos groups to the appropriate users and groups from the authentication provider, and then remove Everyone from the groups membership.

For information about deploying Cognos groups and roles, see "Including Cognos Groups and Roles" (p. 283).

Securing Deployment Archives

A deployment archive (p. 278) can contain sensitive information, such as signons and confidential account or credit card numbers in report outputs. When you export, you can encrypt the deployment archive by setting a password. Later, when you import, you must type the encryption password. The password must contain eight or more characters.

You must encrypt the deployment archive when it contains data source signons (p. 171) or when you deploy the entire content store (p. 280).

The encryption settings are configured in the configuration tool. For more information, see the Cognos 8 *Installation and Configuration Guide*.

Including References to Third-party Namespaces

Some entries, such as groups, roles, distribution lists, contacts, data source signons, and some report properties, such as email recipients and report contacts, can refer to entities in third-party namespaces. When you deploy public folders and directory content, you can deploy these entries with or without the third-party references.

Consider the following:

- Included references

  If you include the references to third-party namespaces, the system verifies that each of the referenced entities exists in the third-party namespaces. Therefore, you must ensure that you are logged on to each third-party namespace, and that you have the necessary permissions to access the required entities in the namespaces. If you cannot access the third-party namespaces, you will encounter errors during the deployment.

- No included references

  If you do not include the references to third-party namespaces, the referenced entities are removed from the membership list of groups, roles, distribution lists, and data source signons and other properties where they may exist.

When you deploy the entire content store (p. 280), all references to third-party namespaces are included.

Deploying the Entire Content Store

Deploying the entire content store ensures that all packages, folders, and directory content are copied to a new location. For example, if you are changing the computer where Cognos 8 is installed, you can move the entire content store from the old environment to the new environment and keep all the reports and other entries created by administrators and users.

Other reasons to deploy the entire content store include

- moving a whole application into a new, empty environment, such as a new computer, from a development environment
- refreshing a whole application into an existing environment, such as an existing computer, from a development environment
- moving an application from an existing environment that uses a different underlying technology, such as a different database type for the content store, or a different operating system
- upgrading the contents of the content store

When you move a content store from one environment to another, you must use the same namespaces for policies, users, roles, and groups to work correctly.

When you deploy the entire content store, if there are no conflicts, the contents of the target content store are removed and replaced by the contents of the source content store, except for configuration data. The imported entries keep the owners from the source content store. For information about conflict resolution, see "Conflict Resolution Rules" (p. 285).

After the deployment is complete, some links for packages associated with reports may not work. You may need to relink packages to reports. For information about linking packages to reports, see the documentation for the studios.

Tip: Instead of deploying the entire content store, you can deploy only specific public folders and directory content (p. 281).

Content Store

The content store includes all entries in the portal, such as:

- public folders
- packages
- reports
- data sources
- distribution lists and contacts
- printers
- schedules
- the Cognos namespace
- deployment specifications

It does not include the deployment history (p. 281). Configuration objects (p. 281) such as dispatchers, are included in exports by default, but excluded in imports.

If you want to deploy users' personal folders and personal pages, you must choose to include the user account information when you export and import.

Deployment History

When you export an entire content store, the export and import deployment specifications that exist in the source content store are exported. Their deployment histories are not exported.

Later, when you import the entire content store, you also import the export and import deployment specifications. You do not see entries in the **View the deployment history** page for the imported specifications.

If any of the imported deployment specifications are used for an encrypted deployment archive, you can delete them. To import an entire content store the first time, you must create a new import deployment specification.

By default, the information saved in deployment records includes the progress and summary reports only. If you want to include more detailed information, change the recording level using the advanced setting CM.DEPLOYMENTDETAILENTIRECONTENT. Use the steps in "Set Advanced Content Manager Parameters" (p. 118). More recording levels are available in partial deployment (p. 284).

Configuration Information

When you import an entire content store, configuration data is included in the export, but excluded from the import by default. We recommend that you do not change this setting. However, if you must import configuration settings, you can change the default in the Advanced Settings (p. 301).

If you import the configuration data, especially in a distributed environment with multiple content managers, the current information about the content manager status may be overwritten by the imported data.

Tip: If you import the configuration, restart the service in the target environment to update status information properly.

For information about including configuration data in the import, see "Include Configuration Objects in Import of Entire Content Store " (p. 301).

For information about how specific objects in the content store are imported, see "Rules For Deploying the Entire Content Store" (p. 286).

Deploying Selected Public Folders and Directory Content

You can choose to do a partial deployment, deploying only selected public folders and directory content, rather than the entire content store (p. 280).

You can deploy any packages and folders in Public Folders. Browse the Public Folders hierarchy and select a package or folder. This will deploy its entire contents. You cannot select specific entries in the packages or folders. During export, the parent packages and folders are not exported and Content Manager does not create placeholder locations for them in the target environment. During

both export and import, you can specify a new target location in the Content Manager hierarchy for each deployed package and folder.

The directory content that you can deploy includes the Cognos namespace, distribution lists and contacts, and data sources and their connections and signons.

For information about how specific objects in the content store are imported, see "Deployment Rules When Importing" (p. 285).

After the deployment is complete, some links for packages associated with reports may not work, even if you included packages and their reports in the deployment. You may need to relink packages to reports. For information about linking packages to reports, see the documentation for the studios.

Tip: If you want to deploy specific entries, you can create a folder at the root level of Public Folders, copy the specific entries to that folder, and select this folder when you deploy.

Deploying Packages

A package is an entry that contains published reports and metadata. Packages are created in Framework Manager, the modeling tool, and then published to Cognos Connection. Packages are stored in the content store and appear as entries in Cognos Connection.

During a partial deployment (p. 281), you can deploy one or more packages at a time. A package can reference objects that are outside the package, such as security objects, data sources, and distribution lists. However, referenced objects are not deployed with the package.

While you are importing, you can deselect packages in the deployment archive that you do not want to import.

Renaming Packages and Folders

During a partial deployment (p. 281), you can rename packages and folders so that they have a new name in the target environment. This is useful if you do not want to overwrite a package or folder that has the same name in the target environment. The original package or folder remains intact, and the deployed one is renamed.

You might also want to add multilingual names for packages and folders so that users can see names suitable for their locale. A locale specifies linguistic information and cultural conventions for character type, collation, format of date and time, currency unit, and messages.

Before you rename packages, you consider the information about renaming entries and what happens to associated references to other entries in "Organizing Entries" (p. 224).

Disabling Packages and Folders

During a partial deployment (p. 281), you can disable the packages and folders in the target environment so that users cannot access them. Disabling packages and folders is useful if you want to test them in the target environment before you make them available to users.

You can disable packages and folders at the time of export or import.

When you disable a package or folder, the entries it contains are not accessible in the target environment after the import. Users cannot run, view, or edit entries. Only users who have write

privileges to the disabled entries can access them. For more information, see "Disable an Entry" (p. 226).

Partial Deployment Options

During a partial deployment (p. 281), when you export and import, you can choose the following options. If you do not select an option when you export, it is not available during import.

Including Report Output Versions

You can choose to include the report output versions (p. 333) in your deployment. If you select this option, you can choose what to do if there is a conflict. You can replace the existing report output versions in the target environment with those from the deployment archive or keep target environment versions.

Including Run History

The run history of a report shows statistics about the status and times when the report ran (p. 264) in your deployment. You can choose whether to include the run history of reports.

If you select this option, you can choose what to do if there is a conflict. You can replace the existing report run histories in the target environment with those from the deployment archive or keep target environment histories.

Including Schedules

You can choose whether to include schedules (p. 269) in your deployment. If you do not deploy schedules, they are removed from the jobs and reports in the target environment.

If you select this option, you can choose what to do if there is a conflict. You can replace the existing schedules in the target environment with those from the deployment archive or keep target environment schedules.

Including Cognos Groups and Roles

You can choose whether to include Cognos groups and roles (p. 185) in your deployment.

When you deploy the Cognos groups and roles, you must deploy them all. However, the following built-in groups are not deployed:

- Anonymous
- All Authenticated Users
- Everyone

When you deploy groups, members of the System Administrators group are merged with the members of this group already in the target environment. This ensures that the target environment is accessible in case the deployed members are not valid. However, you may need to modify the membership list when the deployment is complete.

If you select this option, you can choose what to do if there is a conflict.You can replace groups and roles in the target environment with those from the deployment archive or to keep target environment groups and roles.

Including Distribution Lists and Contacts

You can choose whether to include distribution lists and contacts in your deployment. If you choose to deploy distribution lists and contacts, you must deploy them all.

If you select this option, you can choose what to do if there is a conflict.You can specify whether to replace the distribution lists and contacts in the target environment with those from the deployment archive or to keep the target distribution lists and contacts.

Including Data Sources

You can choose to include data sources and their associated connections (p. 147) in your deployment. If you choose to deploy data sources, you must deploy them all.

You can deploy the data sources with or without their signons. If you do not deploy the signons, you must configure the data sources accordingly in the target environment. If you deploy the signons, you must encrypt the deployment archive.

If you select this option, you can choose what to do if there is a conflict.You can specify whether to replace the data sources in the target environment with those from the deployment archive or to keep the target environment data sources.

If you replace the target data sources, and the data source connections in the source and target environments do not match, you can lose database connections. In this case, you must manually reconnect to the data sources in the target environment after the import, using the third-party database client software.

Including Access Permissions

You can choose to include access permissions (p. 278) in your deployment.

If you select this option, you can choose what to do if there is a conflict. You can specify whether to replace the access permissions in the target environment with those from the deployment archive or to keep the target environment access permissions.

Recording Deployment Details

You can specify what type of information is saved in the deployment records by setting the **Recording Level** for the deployment. The amount of information kept in the records has an impact on performance.

You can set the following recording levels:

- **Basic**

  Saves the deployment progress and summary information. This is the default option.

- **Minimal**

  Saves only the deployment summary information. This option requires the least memory.

- **Trace**

  Saves all deployment details. This option requires the most memory.

For information about recording deployment details when an entire content store is deployed, see "Deployment History" (p. 281).

Ownership Considerations

You can change the ownership of imported entries to the user performing the import. You can select this option at the time of export or import. If you use the owners from the source, the owners are imported along with the entries. You can apply the ownership options to new entries or to new and existing entries.

Deployment Rules When Importing

This section lists the objects in the content store and the rules that apply when they are imported into a target environment. The rules are different depending on whether you deploy the entire content store or selected public folders and directory content. The method you choose determines which objects are included in the import and how conflicts are resolved when an object already exists in the target environment.

Objects in the content store represent entries in the portal and the properties of those entries. For example, the object reportView represents a report view entry in the portal and the object runHistory represents the run history of an entry. For more information about objects, see the Cognos 8 *Developer Guide*.

Objects in **Public Folders** inherit deployment rules by default, depending on whether you are deploying the entire content store (p. 280), or only selected **Public Folders** and directory content (p. 281).

Conflict Resolution Rules

A conflict can occur when the entry that you want to import from the deployment archive already exists in the target content store. When this happens, one of the following conflict resolution rules is used:

Rule	Description
Replace	Replaces the entry and its children. The entry and all its children are removed from the source content store. The new entry and all its children are added to the source content store.
Keep	Keeps the entry. The properties of the entry and all its children are not updated. Existing children of the entry are kept. New children may be added.

Rule	Description
Update	Updates the entry. The properties of the entry and its children are updated. Existing children of the entry are kept. New children may be added.
Merge	Merges the properties of the entries with existing entries.

If an entry has no children, replace and update have the same end result.

Rules For Deploying the Entire Content Store

When you deploy the entire content store, different conflict resolution rules apply to the different areas of the content store.

The default conflict resolution rule for deploying the entire content store is replace, unless specified differently in the deployment rules for the following areas:

- configuration
- capability
- content
- deployment
- directory
- portal

Configuration

When you import the entire content store, objects in the configuration area of the content store are excluded by default.

If you used the advanced settings to include configuration information (p. 301), the configuration is updated rather than replaced. Therefore, existing dispatchers and their configuration in the target environment do not change. However, new dispatchers may be added to the configuration. You may need to unregister dispatchers that are imported if they are not applicable to the target environment (p. 105).

The following table lists the objects in the configuration area of the content store, whether they are included during import, and the conflict resolution rule used. The alignment of the object names represents the hierarchy of the objects. When a parent object is included, its children are also included

Because the root and parent object is replaced, children from the deployment archive replace the existing set of children in the target environment. Therefore, conflicts are unlikely to occur when the children are imported. If a conflict occurs, the conflict resolution rule is to replace the children.

Object name	Included	Rule
configuration	No	Update*
configuration folder	No	Update
dispatcher	No	Update
account	No	Replace
pageDefinition	No	Replace

***Note:** This rule applies only when you manually include the configuration objects using the advanced settings.

Capability

All the objects in the capability area of the content store are included and replaced when you import the entire content store.

The following table lists the objects in the capability area of the content store, whether they are included in the import, and the conflict resolution rule used.

Entry type	Included	Rule
capability	Yes	Update
securedFunction	Yes	Update
securedFeature	Yes	Replace

Content

All the objects in the content area of the content store are included and replaced when you import the entire content store.

Deployment

All the objects in the deployment area of the content store are included and replaced when you import the entire content store except for the importDeployment object, which is handled differently.

To import, you use an importDeployment object in the target environment. The importDeployment object and its children are not replaced so that the import can complete and a deployment history record can be created. All the other importDeployment objects are replaced.

The following table lists the objects in the deployment area of the content store.

Entry type	Included	Rule
adminFolder	Yes	Replace
exportDeployment	Yes	Replace
deploymentHistory	Yes	Replace
adminFolder	Yes	Replace
importDeployment	Yes	Replace
deploymentHistory	Yes	Replace

Directory

Before importing a third party namespace, Cognos 8 verifies that the namespace exists in the startup configuration of the target environment. If the namespace does not exist, an error occurs and the import moves on the next object.

Before importing an account, group, or role, Cognos 8 verifies that the account, group, or role exists in the third party namespace in the target environment. For more information, see "Including References to Third-party Namespaces" (p. 279).

The members of the System Administrators group are always merged when this group is imported.

If you select the option to include user information when you import, the account object for third party namespaces and some of its children are included.

The following table shows the objects in the directory area of the content store.

Entry type	Included	Rule
directory	Yes	Update
namespace (third party)	Yes	Update
namespaceFolder	Yes	Update
account	Set in options	Update
credential	Set in options	Replace
session	No	Not applicable
graphic	No	Not applicable
output	No	Not applicable

Entry type	Included	Rule
runTimeState	No	Not applicable
folder	Set in options	Replace
namespace (Cognos)	Yes	Update
namespaceFolder	Yes	Update
account (anonymous account)	No	Not applicable
credential	No	Not applicable
session	No	Not applicable
graphic	No	Not applicable
output	No	Not applicable
runTimeState	No	Not applicable
folder	No	Not applicable
contact	Yes	Replace
distributionList	Yes	Replace
role group	Yes	Replace
dataSource	Yes	Replace
dataSourceConnection	Yes	Replace
dataSourceNameBinding	Yes	Replace
dataSourceSignon	Yes	Replace
printer	Yes	Replace

Portal

All objects in the portal area of the content store are updated when you import the entire content store.

Rules For Partial Deployment

When you deploy public folders and directory content rather than the entire content store, you select which of the following objects to include:

- Option 1: Cognos groups and roles
- Option 2: distribution lists and contacts
- Option 3: data sources and connections
- Option 4: data sources and connections with signons
- Option 5: report output versions
- Option 6: run histories
- Option 7: schedules

The default conflict resolution rule for partial deployment is update, unless specified differently in the deployment rules for the content and directory areas.

When you deploy public folders and directory content, you cannot include objects from the configuration, capability, exportDeploymentFolder, and importDeploymentFolder areas of the content store (p. 283).

For information about how third-party references are deployed, see "Including References to Third-party Namespaces" (p. 279).

Content

When a parent object is updated, new children from the deployment archive are added and join the existing set of children in the target environment. If a conflict occurs, the conflict resolution rule is to replace the children.

Because all job steps are replaced, no conflict is possible when importing jobStepDefinition objects.

If you include report output versions and run histories and you keep existing entries, the associated objects from the archive are merged with the objects in the target environment. Even though the objects are merged, the retention rules still apply. A full merge may not occur because some objects may be discarded.

Entry type	Included	Rule
content	No	Not applicable
package root level folder	Yes when selected	Update
model	Yes	Replace
modelView	Yes	Replace

Entry type	Included	Rule
folder	Yes	Update
jobDefinition	Yes	Update
jobStepDefinition	Yes	Replace
jobHistory	Yes	Merge or replace Set in Option 6
schedule	Yes	Keep or replace Set in Option 7
query report	Yes	Update
reportCache		Not applicable
cacheOutput		Not applicable
reportView	Yes	Update
reportVersion	Set in Option 5	Merge or replace Set in Option 5
output	Set in Option 5	Replace
graphic	Set in Option 5	Replace
page	Yes or no Set in Option 5	Replace
SQL	Set in Option 5	Replace
runHistory	Set in Option 6	Merge or replace Set in Option 6
schedule	Set in Option 7	Keep or replace Set in Option 7
shortcut	Yes	Replace

Entry type	Included	Rule
URL	Yes	Replace
query agentView	Yes	Update
reportVersion	Set in Option 5	Merge or replace Set in Option 5
output	Set in Option 5	Replace
runHistory	Set in Option 6	Merge or replace Set in Option 6
schedule	Set in Option 7	Keep or replace Set in Option 7

Directory

If you include data sources, connections, and signons, and you keep existing entries, the associated objects from the archive are merged with the objects in the target environment. Even though the objects are merged, the retention rules still apply. A full merge may not occur because some objects may be discarded.

Note that when you want to include Cognos groups and roles, and distribution lists and contacts, these items must be stored in a folder within the namespace in order to be deployed.

The members of distribution lists, groups, and roles in the archive are not merged with the contents in the target environment. Instead, the set of distribution lists, groups, and roles are merged with the set already existing in the target environment. However, the members of the System Administrators group are always merged when this group is imported. For more information, see "Including Cognos Groups and Roles" (p. 283).

Entry type	Included	Rule
directory	No	Not applicable
namespace (third party)	No	Not applicable
namespaceFolder	No	Not applicable
account	No	Not applicable
credential	No	Not applicable

Entry type	Included	Rule
session	No	Not applicable
graphic	No	Not applicable
output	No	Not applicable
runTimeState	No	Not applicable
folder	No	Not applicable
namespace (Cognos)	No	Not applicable
namespaceFolder	Yes if Option 1 or Option 2 is true, *and* they are stored in a folder within the namespace	Update
account (anonymous)	No	Not applicable
credential	No	Not applicable
session	No	Not applicable
graphic	No	Not applicable
output	No	Not applicable
runTimeState	No	Not applicable
folder	No	Not applicable
contact	Set in Option 2	Merge or replace Set in Option 2
distributionList	Set in Option 2	Merge or replace Set in Option 2
role group	Set in Option 1	Merge or replace Set in Option 1

Entry type	Included	Rule
dataSource	Set in Option 3	Merge or replace Set in Option 3
dataSourceConnection	Set in Option 3	Keep or replace Set in Option 3
dataSourceNameBinding	Set in Option 3	Keep or replace Set in Option 3
dataSourceSignon	Set in Option 4	Keep or replace Set in Option 4
printer	No	Not applicable

Deploying Cognos 8 Entries

To deploy Cognos 8, you

- export into a deployment archive in the source environment
- move the deployment archive to the target environment
- include configuration objects if you are importing the entire content store
- import from the deployment archive into the target environment
- test the deployed entries

In Cognos Connection, you can organize your deployment specification in folders in the same way that you organize all your entries. See "Organizing Entries" (p. 224).

Deployment and Agents

Deployment can be part of an agent. For more information, see "Agents" (p. 351).

Deployment Schedules and Run History

You can schedule deployment to run automatically at a specified time or as part of a job. Cognos 8 saves the run history for each deployment specification. After you export or import, you can view the date and time and the status of the deployment. You can also view any error messages created by the deployment and the list of entries that were exported or imported. For more information, see (p. 255).

Permissions

To deploy Cognos 8 entries, you must have execute permissions for the **Administration tasks** secured feature (p. 627) and traverse permissions for the **Administration** secured function. We also recommend that you belong to the System Administrators group and have read and write access to the Cognos namespace so that you can deploy the System Administrators group. For more information, see "Set Access Permissions for an Entry" (p. 194).

When you do a partial export of public folders and directory content (p. 281) rather than exporting the entire content store (p. 280), you must have read and traverse permissions for the entries that you export. You also need write permissions because you create a deployment specification and deployment history when you export. When you import, you must have write and set policy permissions for the entries that you import.

Prerequisites

Cognos 8, as well as any third-party products, must be installed and configured in the source and target environments. For more information, see the Cognos 8 *Installation and Configuration Guide*.

We recommend that you stop the Content Manager service before you export and import. This prevents users from receiving unpredictable results if they are performing operations during the deployment. For example, if users view reports in a package while the package is being imported, users may encounter errors when the report outputs are replaced. For more information, see "Stop and Start Dispatchers and Services" (p. 102).

Before you start, you must plan the deployment to determine what deployment options to use and what entries to deploy (p. 278). You may want to back up before deployment (p. 175).

Create an Export Deployment Specification

To export the Cognos 8 entries, you create an export deployment specification (p. 277). You can also use a previously saved deployment specification for export or for redeployment of your entries.

The entries are exported to an export deployment archive (p. 278) in the source environment. Later, you import the archive entries into the target environment. You can update the entries in the target environment using the entries from the deployment archive.

When you export, you select the entries to deploy, and you set the options that are used as defaults when importing.

Steps to Create a New Export Deployment Specification

1. In the source environment, open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.
4. On the toolbar, click the new export button . The **New Export** wizard appears.
5. Type a unique name and an optional description and screen tip for the deployment specification. Select the folder where you want to save it and click **Next**.

6. Choose whether to export the entire content store or to do a partial export of specific folders and directory content:
   - To export specific folders and directory content, click **Select public folders and directory content**, and then click **Next**. Proceed to step 7.
   - To export the entire content store, click **Select the entire content store** and select whether to include user account information. Click **Next** and proceed to step 18.
7. In the **Select the Public folders content** page, click **Add**.
8. In the **Select entries** page, in the **Available Entries** box, select the packages or folders that you want to export.

   You can browse the Public Folders hierarchy and choose the packages and folders you want.

   Click the right arrow button to move the selected items to the **Selected entries** box, and click **OK**.
9. For each package and folder that you export, do one of the following:
   - If you want the package or folder to have a different name in the target environment, or

     if you want to change the target location or add multilingual names, click the edit icon make your changes, and click **OK**.
   - If you do not want users to access the package or folder and its entries, select the check box in the **Disable after import** column. This is useful when you want to test the reports before you make them available in the target environment.
10. Under **Options**, select whether you want to include the report output versions, run history, and schedules and what to do with entries in case of a conflict.
11. Click **Next**.
12. In the **Select the directory content** page, select whether you want to export Cognos groups and roles, distribution lists and contacts, and data sources and connections and what to do with the entries in case of a conflict.
13. Click **Next**.
14. In the **Specify the general options** page, select whether to include access permissions and references to third-party namespaces, and who should own the entries after they are imported in the target environment.
15. Specify the **Recording Level** for the deployment history (p. 284).
16. Click **Next**.
17. In the **Specify a deployment archive** page, under **Deployment archive**, select an existing deployment archive from the list, or type a new name to create one.

    If you are typing a new name for the deployment archive, we recommend that you do not use spaces in the name. If the name of the new deployment specification matches the name of an

existing deployment archive, the characters _# are added to the end of the name, where # is a number such as 1.

18. If you want to secure the archive, under **Encryption**, click **Set the encryption password**, type a password, and then click **OK**.
19. Click **Next**.

    The summary information appears.
20. Review the summary information and click **Next**.

    Tip: If you want to change information, click **Back** and follow the instructions.
21. Review the summary information and click **Next**.
22. Select the action you want:
    - To run now or later, click **Save and run once** and click **Finish**. Specify the time and date for the run. Then click **Run**. Review the run time and click **OK**.
    - To schedule at a recurring time, click **Save and schedule** and click **Finish**. Then, select frequency and start and end dates. Then click **OK**.

      Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see "Manage Scheduled Activities" (p. 261).
    - To save without scheduling or running, click **Save only**, and then click **Finish**.

After you run the export, you can move the deployment archive. You can also see the export run history (p. 264).

Steps to Modify an Existing Export Deployment Specification

1. In the target environment, open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.
4. In the **Actions** column, click the properties button for the deployment specification you want to modify, and then click the **Export** tab.
5. Modify the deployment options as required.

   Tip: If you want to change the export target location, click the edit button next to the export name in the **Target name** column, the **Public Folders content** section, and choose the package or folder you want.
6. Click **OK**.

This saves the options and you can run the export now or at a later time (p. 298).

Steps to Run an Export

1. In the **Actions** column, click the run with options button .
2. Click **Now** to run the export immediately, or click **Later**, and enter the time, that you want the export to run.

   You can also schedule a task to run on a recurring basis, and view a list of scheduled tasks using the Schedule Management tool. For more information, see "Schedule Management" (p. 269).

   Tip: To avoid warning messages when logged into multiple namespaces, before you run the export next time, renew your credentials. In Cognos Connection, in the upper-right corner, click the my area button , and then click **My Preferences**. On the **Personal** tab, in the **Credentials** section, click **Renew the credentials**.

You can now move the deployment archive.

Move the Deployment Archive

Move the deployment archive that you created in the source environment to the target environment. Later, you use the deployment archive to import in the target environment.

If the source and target environments use the same content store, you can import without moving the deployment archive.

The location where deployment archives are saved is set in the configuration tool. The default location is *c8_location*/deployment.

If you plan to move the deployment archive to a location on a LAN, ensure that there is enough disk space. If you did not encrypt the deployment archive, we recommend that you copy it to a secure location.

Steps

1. Copy the deployment archive from the source environment to a location on the LAN or to a CD.
2. Copy the deployment archive from the LAN or CD to the target environment in the location set in the configuration tool.

You can now include configuration objects if you're importing an entire content store or import to the target environment.

Import to a Target Environment

You import entries from the deployment archive (p. 278) into the target environment. To import the entries, you create an import deployment specification (p. 277).

You can import using an existing deployment specification if you previously saved it without importing, or if you want to redeploy your Cognos 8 entries. You can update the entries in the target environment with entries from the deployment archive.

When you import, you select from entries that were exported. You can either accept the default options set during the export, or change them. You cannot select options that were not included in the deployment archive during the export. For information about how specific objects in the content store are imported, see "Deployment Rules When Importing" (p. 285).

You can also use the New Import wizard to upgrade entries from previous releases of the product. You can upgrade report specifications during the import, or choose to upgrade them at a later time using the New Report Upgrade wizard. For more information, see "Upgrade Report Specifications" (p. 302).

To use an existing import deployment specification, see "Steps to Modify an Existing Import Deployment Specification" (p. 300)

Partial Deployment

If you do a partial deployment of specific public folders and directory content, the import wizard shows whether packages and folders already exist in the target environment and the date and time they were last modified. You can use this information to help you decide how to resolve conflicts. When you redeploy, the wizard also shows whether the packages and folders were in the original deployment.

Steps to Create a New Import Deployment Specification

1. In the target environment, open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.
4. On the toolbar, click the new import button . The **New Import** wizard appears.
5. In the **Deployment archive** box, click the deployment archive that you want to import.
6. If the deployment archive is encrypted, type the password, and then click **OK**.
7. Click **Next**.
8. Type a unique name and an optional description and screen tip for the deployment specification, select the folder where you want to save it, and then click **Next**.
9. Select the content that you want to include in the import.

   Tip: To ensure that the required target package or folder exists in the target content store, click the edit button next to the package, and check the location. If you want, you can change the target location now.
10. Select the options you want, along with your conflict resolution choice for options that you select.

11. In the **Specify the general options** page, select whether to include access permissions and references to third-party namespaces, and who should own the entries after they are imported in the target environment.
12. Specify the **Recording Level** for the deployment history (p. 284).
13. Click **Next**.

    The summary information appears.
14. Review the summary information and click **Next**.
15. Select the action you want:
    - To run now or later, click **Save and run once** and click **Finish**. Specify the time and date for the run. Then click **Run**. Review the run time and click **OK**.
    - To schedule at a recurring time, click **Save and schedule** and click **Finish**. Then, select frequency and start and end dates. Then click **OK**.

      Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see "Manage Scheduled Activities" (p. 261).
    - To save without scheduling or running, click **Save only** then click **Finish**.

      When you run the import, you have the option of selecting to upgrade the report specification. If you choose not to upgrade the deployment specification at this time, you can upgrade it later. For more information, see "Upgrade Report Specifications" (p. 302).

After you run the import, you can test the deployment. You can also see the import run history (p. 264).

Steps to Modify an Existing Import Deployment Specification

1. In the target environment, open Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.
4. In the **Actions** column, click the properties button for the deployment specification you want to modify, and then click the **Import** tab.
5. Modify the deployment options as required.

   Tip: If you want to change the import target location, click the edit button next to the import name in the **Target name** column, the **Public Folders content** section, and choose the package or folder you want.
6. Click **OK**.

This saves the options and you can run the import now or at a later time (p. 301).

Steps to Run an Import

1. In the **Actions** column, click the run with options button .
2. Click **Now** to run the import immediately, or click **Later**, and enter the time, that you want the import to run.
3. If you want to upgrade the report specifications, click **Upgrade all report specifications to the latest version**.

   You can also schedule a task to run on a recurring basis, and view a list of scheduled tasks using the Schedule Management tool. For more information, see "Schedule Management" (p. 269).

You can now test the deployment.

Include Configuration Objects in Import of Entire Content Store

You can include configuration objects when importing an entire content store. For example, you may want to import the configuration because you have a series of advanced settings for your services that you want from the source environment.

By default, configuration objects are excluded when you import an entire content store, even though they are included in the export. Configuration objects include dispatchers and configuration folders used to group dispatchers. For more information, see "Rules For Deploying the Entire Content Store" (p. 286).

We recommend that you do not import configuration objects. Dispatchers should be configured in your target environment before you import data from a source environment. If you must import configuration objects, you should either stop the source dispatcher services before the import, or restart Cognos 8 in the target environment after the import. Otherwise, you may get errors with the status of dispatchers. If you want to import configuration objects, you must be prepared for a brief interruption of services.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Dispatchers and Services**.
3. Click the dispatcher you want.
4. Next to **ContentManagerService**, click the set properties button.
5. Click the **Settings** tab.
6. In the **Value** column, click **Edit**.
7. Select the **Override the settings acquired from the parent entry** check box.
8. In the **Parameter** column that appears, type the following in uppercase:

CM.DEPLOYMENTINCLUDECONFIGURATION

9. In the **Value** column, type **true**
10. Click **OK** to finish.

Testing Deployed Applications

After you import the packages from the deployment archive, you may want to verify that all the entries were deployed successfully in the target environment.

You can test your deployment by

- reviewing the run history for a deployment
- ensuring that the correct packages and folders were imported along with their contents
- ensuring that the data sources, distributions lists and contacts, and Cognos groups and roles were imported
- verifying the permissions for the imported entries
- ensuring that the schedules were imported
- ensuring that any references to renamed packages were updated
- running imported reports and report views

Upgrade Report Specifications

If you did not upgrade report specifications when you ran the import wizard, you can upgrade them using the New Report Upgrade wizard.

Important: Do not upgrade your report specifications if you have SDK applications that create, modify, or save report specifications. You must first update your SDK applications to comply with the Cognos 8 report specifications schema. Otherwise, your SDK applications may not be able to access the upgraded report specifications. For information about upgrading report specifications, see the Cognos 8 *Developer Guide*.

Steps

1. Log on to Cognos Connection as an administrator with execute permissions for the **Content Administration** feature (p. 203).
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Content Administration**.
4. Click the arrow on the new content maintenance button on the toolbar, and then click **New Report Upgrade**
5. Type a name for the upgrade task and, if you want, a description and screen tip. Click **Next**.

6. Select the packages and locations for the report specification you want to upgrade. Click **Next**.

   If you upgrade report specifications by package, all reports in the content store that are based on the model in the package will be upgraded. If you upgrade report specifications by folder, all reports in the folder will be upgraded.

7. Choose one of the following:

   - **Save and run once** opens the run with options page.
   - **Save and schedule** opens the scheduling tool.
   - **Save only** allows you to save the upgrade so that you can run it at a later time.

Chapter 19: Administering Packages

Models and packages use corporate business rules to define and group the data to be used for business reporting.

A model is a data structure containing imported data from one or more data sources. Cognos 8 users responsible for data modeling use Framework Manager to create models.

The data modeler creates a package that defines a subset of data that is relevant to an intended group of users. For example, the data modeler may create a package that marketing managers use for information related to market research. The package can then be distributed to report authors by publishing it to the portal. When you run a report, the result set is defined by the data retrieval information defined in the package.

In Cognos Connection, you can manage packages the way you manage other entries. For example, you can organize packages in folders, create shortcuts to packages, and move or copy packages.

For more information about models and packages, see the Framework Manager *User Guide*.

Data Trees

Data trees may contain many hierarchical levels and items (members). If all levels and members appear, the data trees may be difficult to use. After packages are deployed to Cognos 8 (p. 277), you can specify how data trees appear in Analysis Studio.

The settings do not affect the model. They affect only the package configuration. The settings for a package are obtained by Analysis Studio when an analysis is opened. The settings are also obtained when a Analysis Studio analysis is opened in Cognos Viewer.

Setting	Purpose
Default member limit in a data tree level	The number of members that appear at a time. If your data tree has only 50 members, you may want to set this to 55 so that users do not have to click a link to see all members. Valid settings are 0 to 50. Default: 20

Setting	Purpose
Maximum member limit in a data tree level	The number of times users can show more members. Thereafter, users must search for a specific member. For example, if this is set to 5 and the memberDisplayCountDefault setting is 20, users can show 20 members at a time up to 5 times before they must search for a specific member. If your data tree is large, you may want to set this to a low number because users can find the that member they are looking for faster by searching. Valid settings are 0 to 50. Default: 50

Configure or Reconfigure a Package

After a new package is deployed, the default settings are used. You can configure a new package to use different settings or you can modify the settings of an existing package configuration at any time.

You must have write permission for the package. To modify the package configuration, you must also have write permission for package configuration (p. 306).

Steps

1. In Cognos Connection, locate the package you want.
2. In the **Actions** column, click **More**.
3. Click **New package configuration** or **Modify the package configuration**.
4. Click **Select an analysis**.
5. Select the default analysis to be used for this package when new analysis is created.
6. Click **OK**.
7. Change the package settings as required and click **Finish**.

Set Permissions for Package Configuration

To modify a package configuration, you must have write permission for package configuration. For more information on permissions, see "Access Permissions" (p. 191).

Steps

1. In Cognos Connection, locate the package you want.

2. In the **Actions** column, click **More**.
3. Click **Modify the package configuration**.
4. Click the **Permissions** tab.
5. Click **OK**.

Remove a Package Configuration

After you configure a new package, you can remove the configuration at any time. You may want to do this to return to the default settings.

Steps

1. In Cognos Connection, locate the package you want.
2. In the **Actions** column, click **More**.
3. Click **Remove the package configuration**.
4. Click **OK**.

Chapter 20: Managing User Profiles

User profiles contain portal tab and personal folder content, as well as user preferences such as product language, the preferred output format of reports, and the style used in the user interface. The default user profile applies to all new users. You may want to edit the default user profile for your users (p. 309).

You can perform the following tasks on user profiles in Cognos 8:

- deleting user profiles (p. 310)
- copying user profiles (p. 310)
- viewing or changing user profiles (p. 311)

Users can change their own preferences. For more information, see "Personalize the Portal" (p. 231).

User entries are created in third-party authentication providers. For more information, see "Users, Groups, and Roles" (p. 185).

Edit the Default User Profile

The default user profile contains settings that apply to all new user profiles. You can edit the default user profile for your users to minimize the number of changes you need to make to individual user profiles.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch, Cognos Administration**.
3. On the **Security** tab, click **Users, Groups, and Roles**.
4. Click the Cognos namespace.
5. On the toolbar, click the edit default user profile button .
6. Set the default user profile and click **OK**.

Delete a User Profile

You can delete user profiles from the content store. This is useful if you are deleting a user using your third-party authentication provider. You may first want to delete the user profile from the content store so that it no longer uses storage space.

You should delete the user profile from Cognos 8 before you delete the user in the associated namespace. After you delete the user from the authentication provider, the associated user information no longer appears in Cognos 8 and you cannot manage the user profile by deleting user profiles using **Cognos Administration**.

If the user account was already deleted from the associated namespace, you can use content store maintenance (p. 118) to find, and optionally remove, all associated user account information from Cognos 8.

If a user with a deleted user profile logs on, an account is created using defaults. If a user is logged on when you delete the user profile, the user's passport expires and the logon page appears.

Before you delete a user profile, you may want to view the content (p. 311) to ensure that you are not deleting anything important.

You can work only with profiles of users who logged on at least once. When users have logged on, there is a date displayed in the **Modified** column.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199). To delete a user profile, you must have write access to the parent object.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Security** tab, click **Users, Groups, and Roles**.
4. Click the namespace that contains the user.
5. Find the user whose user profile you want to delete. You can use the Search feature to find a user (p. 230).
6. In the **Actions** column, click **More**.
7. Click **Delete this user's profile**.
8. Click **OK**.

Copy a User Profile

You may want to copy a user profile. This is useful in the following situations:

- A user changes names and you are setting up an account in the new name.

- A user moves to another namespace or your organization changes namespaces and you must set up new accounts.
- You are creating many new similar user accounts.

If you plan to delete the source user using your third-party authentication provider, copy the user account information before you delete it. After you delete the user, the user no longer appears in Cognos 8 and you cannot copy the user's account information.

When you copy a user profile, trusted credentials are not copied.

You can only work with profiles of users who have logged in at least once. When users have logged on, there is a date displayed in the **Modified** column.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199). To copy user profiles, you must have write access to the namespaces for both the source and target users.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Security** tab, click **Users, Groups, and Roles**.
4. Click the namespace that contains the source user (the user you want to copy from).
5. Find the source user. You can use the **Search** feature to find a user (p. 230).
6. Click **Select the target user**.

   The **Select the user page** appears.
7. Click the namespace that contains the target user (the user you want to copy to).

   Tip: You can select only the namespaces that you have write access to.
8. Select the target user and click **OK**.
9. Select one or more of the following profile settings that you want to copy: **Preferences**, **Portal tabs**, or **Personal folders content**.
10. If required, select the **Delete the source user's profile after the copy completes** check box.
11. Click **Copy**.

View or Change a User Profile

You can view or change user preferences. You can also delete specific items in a user's **My Folder** (p. 228) and **Portal** (p. 237). This may be useful in the following situations:

- The **My Folders** or **Portal** content for a user is taking up so much space that performance is affected. You want to delete some or all of the content.

- You want to view a user profile before deleting it to ensure that you do not delete any important content.

If a user was deleted using your third-party authentication provider, the user no longer appears in Cognos 8 and you cannot change the user profile.

You can only see user profiles of users who have logged in at least once. When users have logged on, there is a date displayed in the **Modified** column.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199). To view a user profile, delete content, or change content, you must have traverse permissions for the user account and any other folder that must use **Public Folders**. You must also have write permissions for the object and the parent of the object that you want to delete.

Steps to View or Change Preferences

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Security** tab, click **Users, Groups, and Roles**.
4. Click the namespace that contains the user.
5. Find the user whose preferences you want to view or change. You can use the Search feature to find a user (p. 230).
6. In the **Actions** column, click **More**.
7. Click **Set preferences**.
8. Click **Cancel** to exit without making changes or make changes and click **OK**.

Steps to Delete Content

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Security** tab, click **Users, Groups, and Roles**.
4. Select the namespace that contains the user.
5. Find the user. You can use the Search feature to find a user (p. 230).
6. In the **Name** column, click the user.

   A list of the user's folders appears.
7. Click a folder to see its contents.

   You cannot delete the folders themselves.
8. Click an item in a folder, then click the delete button on the toolbar.

Chapter 21: Administering Microsoft Office Documents

Microsoft Office users can import data from Cognos 8 reports into workbooks, presentations, and documents using Cognos 8 Go! Office and then publish the workbooks, presentations, and documents to the Cognos 8 portal. For more information, see the Cognos 8 Go! Office *User Guide* and the Cognos 8 BI Analysis for Microsoft Excel ® *User Guide*. Cognos Connection users can then download the workbooks, presentations, and documents for viewing or editing in the Microsoft Office application that was used to create it.

Note: The only way to publish Microsoft Office workbooks and presentations in Cognos 8 is to use Cognos 8 Go! Office or Cognos 8 BI Analysis.

Before users can import Cognos 8 data into Microsoft Office documents or publish those documents in the Cognos 8 portal, you must deploy the Cognos 8 Go! Office and Cognos 8 BI Analysis client to the users' workstations.

Deploying Cognos 8 Go! Office Client

Cognos 8 Go! Office is automatically installed with Cognos 8 server components. After Cognos 8 is installed and configured, you can deploy Cognos 8 Go! Office to client workstations.

Cognos 8 Go! Office uses Microsoft .NET Framework to allow users to interact with server-based components. Microsoft .NET Framework and the required updates are downloaded and installed by the setup file when you install Cognos 8 Go! Office. The setup file must be run on all user computers.

For a list of supported versions of Microsoft .NET Framework, view the Cognos Global Customer Services Web site (http://support.cognos.com).

When you deploy Cognos 8 Go! Office, you install Microsoft .NET Framework and the support files using the provided setup executable (p. 313), configure security, and enable or disable the Cognos 8 Go! Office functionality (see the *Installation and Configuration Guide*).

Use the following checklist to guide you through the deployment process:

- ❑ Install .NET Framework and Cognos 8 Go! Office.
- ❑ Set the macro security level for Microsoft Office XP, if required.
- ❑ Test Cognos 8 Go! Office.

Install Microsoft .NET Framework and Cognos 8 Go! Office

To install Microsoft .NET Framework and Cognos 8 for Microsoft Office, you run a setup.exe file from a central LAN location. The file installs and updates your Microsoft .NET Framework, installs

the Primary Interop Assemblies (PIAs) that are required by Microsoft Office, and installs the Cognos 8 for Microsoft Office components.

When you install Microsoft .NET Framework in a non-English operating system, Microsoft .NET error messages, shortcuts, and utilities appear in English.

For a language other than English, you can apply the Microsoft .NET Framework Language Pack to view error messages, shortcuts, and utilities in your language. For example, if your operating system is French and you installed Microsoft .NET Framework, you must also apply Microsoft .NET French Language Pack. You can download .NET Framework Version 2.0 Language Pack from http://www.microsoft.com/downloads/.

Before you update and install components, ensure that you

- have administrative privileges on the computer
- uninstalled the previous version of Cognos 8 Go! Office
- have the appropriate license to use Cognos 8 Go! Office

Steps

1. From the LAN location, run the setup.exe file.

   The installation wizard checks whether Microsoft .NET Framework is installed.

2. If the **Cognos 8 for Microsoft Office Setup** dialog box shows the License Agreement page for Microsoft .NET Framework 2.0, click **Accept**.

3. In the **Cognos 8 for Microsoft Office Setup** dialog box, click **Install**.

   If Microsoft .NET Framework is being installed, a progress dialog appears while the files are downloaded from the Microsoft download Web site and then installed. This may take several minutes.

   A progress dialog appears while the shared add-in support update for Microsoft .NET Framework is installed. When the update is complete, the Cognos 8 for Microsoft Office setup Wizard appears.

4. In the **Welcome to the Cognos 8 for Microsoft Office Setup Wizard** page of the Cognos 8 for Microsoft Office window, click **Next**.

5. In the **License Agreement** page, select **I Agree** and then click **Next**.

6. In the **Select Installation Folder** page, do the following:

   - Select the installation directory that you used for the old version, such as C:\Program Files\Cognos\Cognos Office\.
   - Select **Everyone**.

     When you select **Everyone**, all users who log on to the computer will see **Cognos 8** in the toolbar of the Microsoft Office products. If you select **Just Me**, only the user who installed Cognos 8 for Microsoft Office will see **Cognos 8** in the toolbar.

   - Click **Next**.

If a dialog box appears, advising you to uninstall a previous version, follow the prompts and uninstall the previous version, and then resume the installation.

7. In the **Confirm Installation** page, click **Next**.

   The wizard installs the Cognos 8 Go! Office components.

8. In the **Installation Complete** page, click **Close**.

Set Macro Security Level for Microsoft Office XP

For Microsoft Office XP applications to run Cognos 8 Go! Office, you must set your macro security level to an appropriate level. You must set this for Microsoft Office Excel, Microsoft Office Word, and Microsoft Office PowerPoint.

Steps

1. Open your Microsoft Office XP application.
2. From the **Tools** menu, click **Macros**, and then click **Security**.
3. Choose whether to change the security level or the trusted publishers.
   - On the **Security Level** tab, click **Medium** or **Low**, and then click **OK**
   - On the **Trusted Publishers** tab, select **Trust all installed add-ins or templates**, and then click **OK**.

Test Cognos 8 Go! Office

You can test the installation of the client components by starting Cognos 8 Go! Office. Cognos 8 Go! Office starts automatically when users start Microsoft Office Word, Microsoft Office Excel, or Microsoft Office PowerPoint, or when users open a Microsoft Office file or template.

Steps

1. Start Microsoft Office Excel, Microsoft Office Word, or Microsoft Office PowerPoint or open a Microsoft Office document, workbook, or presentation.
2. Confirm that **Cognos 8** appears in the toolbar.

   If **Cognos 8** is not in the toolbar, from the **View** menu, click **Toolbars**, **Cognos 8 for Microsoft Office**.

3. To show the action pane, click **Cognos 8** in the toolbar.

   The **Cognos 8 for Office** pane appears on the right-hand side of the window. It includes a link to Cognos 8 Go! Office.

Download a Microsoft Office Document

You can download a Microsoft Office document from Cognos Connection if it was published in Cognos 8 using Cognos 8 Go! Office or Cognos BI Analysis for Microsoft Excel ®. For more information, see the Cognos 8 Go! Office *User Guide* and the Cognos 8 BI Analysis for Microsoft Excel ® *User Guide*.

You can download documents created in Microsoft Office Excel, Microsoft Office PowerPoint and Microsoft Office Word. The default action for any Microsoft Office document is to download it.

You must have read and traverse permissions to access Microsoft Office documents in Cognos Connection.

For more information, see "Secured Functions and Features" (p. 199).

Steps

1. In Cognos Connection, locate the document that you want to open.
2. Click **more** on the actions toolbar to the right of the document that you want to download.

   The Cognos Connection actions page opens.
3. Download the Microsoft Office document:
   - For a Microsoft Office workbook, click the **View most recent document in Excel** object .
   - For a Microsoft Office presentation, click the **View most recent document in PowerPoint** object .
   - For a Microsoft Office word document, click the **View most recent document in Word** object .
   - For a Microsoft Office document of unknown type, click the **View most recent document** object .

   The **File Download** dialog box appears.
4. Click **Open** or **Save** and follow the prompts that appear.

   When you open the document, it opens in the application that was used to create it.

You can now perform the same actions that you would perform for any Microsoft Office document of the selected type.

Chapter 22: Reports and Cubes

You can use reports, cubes, and documents to analyze data and help you make informed and timely decisions. In Cognos 8, reports and cubes can be published to the portal to ensure that everyone in your organization has accurate and relevant information when they need it.

Query Studio and Report Studio Reports

Typically, for Query Studio and Report Studio reports, your data modeler creates models (p. 217) from subsets of corporate data. These models are then published as packages in Cognos 8. Query Studio and Report Studio users can create reports based on the packages and publish them in Cognos 8. In Cognos Connection, a Query Studio report is called a query and a Report Studio report is called a report.

OLAP sources do not need additional modeling.

Analysis Studio Reports and Cubes

An Analysis Studio administrator can publish Analysis Studio reports and cubes in Cognos 8. Analysis Studio users can create reports and publish them in Cognos 8. In Cognos Connection, an Analysis Studio report is called an analysis.

Working with Reports and Cubes

A report can refer to the specification that defines the information to include in a report, or the results themselves. For Report Studio and Query Studio, report specifications can have saved results or you can run a report to produce new results. For Analysis Studio, reports are always run against the latest data in the cube.

After a report is published to the portal, you can view, run, or open it (p. 318) or view report output versions (p. 333). You can also view the report in various formats (p. 326).

You can distribute reports by saving them, sending them by email, printing them, or bursting them (p. 340). You can also set run options for the current run (p. 320), and set advanced run options for the current run (p. 321).

You can create an ad hoc report using Query Studio or you can use Report Studio to define layouts, styles, and prompts for your report (p. 323). You can also create Analysis Studio reports (analyses) .

You can schedule a report to run at a later time or on a recurring basis. You can schedule a report as part of a job or based on a trigger. You can view the run history for a report. For more information, see "View the Run History for Entries" (p. 264). You can also include a report in an agent (p. 351).

You can add yourself to the alert list for a report so that you are alerted when new versions of the report are created (p. 335). You can also specify watch rules in saved HTML report output so that you are alerted whenever the events specified by the watch rules are satisfied (p. 336).

You can disable selection-based features (p. 338), such as drilling up and down and drill-through.

You organize your report entries in a way that is convenient for you. For more information, see "Cognos Connection" (p. 213).

Mixed Currencies

Mixed currency values occur when you calculate values with different currencies. When using an OLAP data source, mixed currency values use the asterisk character (*) as the unit of measure.

Accessibility for the Disabled

Cognos is committed to assisting people with disabilities, and promotes initiatives that make workplaces and technologies accessible. Cognos 8 provides an accessible report reading solution. This solution allows disabled users and users of Assistive Technology the ability to access and display reports in Cognos Viewer.

Series 7 Reports and Cubes

For information on working with Series 7 reports and cubes in Cognos 8, see "Series 7 Reports in Cognos Connection" (p. 345).

View, Run, or Open a Report

You can view the most recent run of a report, run a report, or open a report in the authoring tool. The default action is to view the most recent run of a report but you can select the default action that you prefer (p. 318).

You must have execute permission to run a report. You must have read and traverse permissions for the folder that contains the report.

Step

- In Cognos Connection, click the report that you want.

  For more information about using PowerPlay Web Explorer, see PowerPlay Web *User's Guide*.

  For information about using Analysis Studio, see the Analysis Studio *User's Guide*.

Set Default Report Options

You can set one of the following actions as the default when a report is run (p. 318):

- view the most recent report or run if it has not been previously run (default)
- run the report
- open the report in the authoring tool that was used to create it (Query Studio, Report Studio, or Analysis Studio)

You can set default report options such as format and language. You can also set the default to prompt for values (p. 331) and run as the owner. For information about properties, see "Entry Properties" (p. 217).

You must have execute permissions for the report. You must have read and traverse permissions for the folder that contains the report.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report.
2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for a Analysis Studio report.
3. Under **Default action**, select the default action for when the report is run.
4. If you want to override report options, under **Report options**, click the **Override the default values** check box.

   You can change some or all of the options, such as format and language.

   For information about setting advanced PDF options, see "Set Advanced PDF Options for a Report" (p. 327).
5. If you want to prompt for values to filter the data in the report, click select the **Prompt for values** check box under **Prompt Values**.

   Note: You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons.
6. If you want to run the report using the owner credentials, click the check box next to the owner listed under **Run as the owner**.
7. To set additional report options, click **Advanced options**.
   - Under **Number of rows per Web page in HTML reports**, click the number of rows you want to allow.
   - To allow such features as drill up and drill down, drill through, Cognos Search, watch rules, and agent notification when the report is viewed in Cognos Viewer, select **Enable selection-based interactivity in HTML reports**.
   - If you want to allow the creation of additional output formats so that watch rules can be evaluated and saved output versions can be imported into Cognos 8 Go! Office, select **Enable enhanced user features in saved output versions**.
   - If you want users to receive alerts when new report output is generated, select **Enable alerts about new versions**.
8. Click **OK**.

Set Report Options for the Current Run

You can set the following options for the current run of a report:

- report output format (p. 326)
- language (p. 329)
- delivery method (p. 340)
- prompt for values (p. 331)

These options override the defaults for a report for a one-time run.

Tip: You can also force database access by clicking **More** next to the report, and then clicking **Clear the cache**.

You can change default run options for reports (p. 318)

If you change the delivery method while a report is running, the run operation is cancelled. The report is run again using the new delivery method that you select. This can be time-consuming for large reports. To save time, specify the delivery method before you run the report.

To specify a time for the report to run, to choose additional formats or more than one language, or for additional delivery methods, use advanced run options (p. 321).

You must have execute permissions for the report you are attempting to run. You must have read and traverse permissions for the folder that contains the report.

Steps

1. In Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.
2. Under **Format**, click the format that you want for the report output.
3. Under **Language**, click the language that you want for the report output.
4. Under **Delivery**, choose to view the report now, save the report, or print the report.
5. If you choose to print, click **Select a printer**, click the button next to the printer you want to use, and click **OK**. If the printer is not listed, you can type the printer information.

   Tip: If you have administrator privileges and want to set up the printer for future use, click **New printer**. You must type the network address of the printer by using the format \\ *server_name**printer_name* for a network printer on a Windows installation and *printer_name* for a UNIX installation or for a local printer.
6. If you want to prompt for values to filter the data in the report, under **Prompt Values**, click the **Prompt for values** check box.

   You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons.
7. Click **Run**.

Set Advanced Report Options for the Current Run

You can specify the following advanced run options for a report for the current run:

- time when the report should run
- multiple report output formats if you choose to run the report later and additional format choices for HTML and PDF (p. 326)
- one or more languages (p. 329)
- one or more delivery methods (p. 340)
- prompt for values (p. 331)
- burst the report (p. 340)

The report runs in the background if you run the report later, select multiple report formats or languages, select to save, print or email the report, or burst the report. If you set your preferences to show a summary of the run options (p. 231), the summary appears whenever the report is not run interactively.

The report runs in the background. When done, the output versions button appears next to the report on the **Actions** toolbar.

Tip: Click the output versions button to view the selected formats. For more information, see "View Report Output Versions" (p. 333).

Default options are set by the report author. You can change default run options for reports "Set Default Report Options" (p. 318).

If you choose to save, print, or send the report by email, you can choose multiple formats. If you choose to run the report later, the delivery option is automatically changed to save. For more information on saving report output, see "Save Report Output" (p. 332).

You must have execute permissions for the report you are attempting to run. You must have read and traverse permissions for the folder that contains the report. You need the appropriate permissions to set advanced run options.

Steps

1. In Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.
2. Click **Advanced options**.
3. Under **Time and mode**, click **Run in the background**, and then click **Now** or **Later**. If you specify **Later**, set a date and time for the report to run.
4. Under **Format**, click the formats you want for the report output.
   - The Enable selection-based interactivity check box is selected by default. For information about deselecting this option, see "Disable Selection-based Interactivity" (p. 338).

5. If you want to select a different or additional languages for the report, under **Languages**, click **Select the languages** and use the arrow keys to move the available languages to the **Selected languages** box and click **OK**.

   Tip: To select multiple languages, use the Ctrl key or use the Shift key.

6. Under **Delivery**, choose the delivery method that you want:

   - If you schedule a report for a future time, select multiple formats or languages, or burst the report. You cannot view the report now. Select one of the other delivery methods.
   - If you choose to print, click **Select a printer**. Click the button next to the printer you want to use and click **OK**. Or, if the printer is not listed, you can type the printer information.
   - If you choose to save using report view, you can change the name or destination folder of the report view. Click **Edit the save as options**, make the changes and click **OK**.
   - If you choose to email the report, proceed to step 7.

     Tip: If you have administrator privileges and want to set up the printer for future use, click **New printer**. You must type the network address of the printer by using the format \\ *server_name**printer_name* for a network printer on a Windows installation and *printer_name* for a UNIX installation or for a local printer.

7. If you select **Send the report by email**, click **Edit the email options** and set the following options:

   - To display the blind copy field, click **Show Bcc**.
   - To choose Cognos 8 recipients, click **Select the recipients**. Select the check box next to the names you want to include, and click **To**, **Cc** (copy), or **Bcc** (blind copy). The entries that you select are listed under **Selected entries**.

     Tip: To select all entries in a list, click the check box in the upper-left corner of the list. To remove names from **Selected entries**, select the check box next to the name and click **Remove**. To search, click **Search**. In the **Search string** box, type the phrase you want to search for. For advanced search features, click **Edit**. For more information, see "Search for an Entry" (p. 230).

     When you are done, click **OK**.
   - To send the email to other recipients, in the **To:**, **Cc**, or **Bcc** boxes, type the email addresses separated by semicolons (;).

     Tip: If you logged on, your name automatically appears in the **To** list box.
   - Under **Subject**, type the subject of the email.
   - Under **Body**, type a message to be included in the email.

     Tip: By default, the body of the email is in HTML format, which provides advanced editing features such as font type and size, text color, text formatting and justification, numbers and bullets, indentation, and tables. To use plain text, click **Change to plain text**.
   - To include a hyperlink to the report, select the **Include a link to the report** check box. To include the report as an attachment, select the **Attach the report** check box.

- Click **OK**.

  You can prevent users from including attachments. For more information, see "Disable Report Attachments in Email Messages" (p. 488).

8. If you want to be prompted for values to filter the data in the report, under **Prompt Values**, select the **Prompt for values** check box.

   If you run the report later, the prompt values you provide are saved and used when the report runs.

   Note: You are prompted for values only if the report specification or model includes prompts or if you have access to multiple data source connections or signons, even if the Prompt for values check box is selected.

9. Under **Bursting**, specify whether the report should be bursted.

   This option is available only if the report author defined burst keys in the report.

10. Click **Run**.

Create a Report

You can create reports to analyze data and answer specific questions related to your business.

Use Query Studio to intuitively explore data by creating ad hoc reports. Report Studio is a comprehensive report authoring environment. Use it to create both highly interactive and sophisticated production reports for mass consumption by specifying queries and layouts for each report. Use Analysis Studio for analyses.

Access to the report authoring tools is controlled by the capabilities defined for your logon. If you require access to the report authoring tools but the links are not available on the top navigation bar, contact your system administrator.

An existing report may contain most of the information you require, but you may need new prompt values or changes to the layout or style. Instead of creating a new report, you can create a report view to satisfy your requirements (p. 324).

For instructions about using the studios, see the following guides:

- Query Studio *User Guide*
- Report Studio Professional Authoring *User Guide*
- Cognos Analysis Studio *User Guide*

Before creating a report, confirm that the package containing the data for your report is available in the portal. If you do not have access to the package, contact your administrator.

Tip: A package is identified by the package icon .

You must have write and traverse permissions for the folder in which you want to save the new report.

Steps

1. Choose whether you want to create a simple or complex report:
   - To create a simple report, in the upper right corner, click the **Query Studio** link .
   - To create a complex report, in the upper right corner, click the **Report Studio** link .
   - To create an Analysis Studio report, in the upper right corner, click the **Analysis Studio** link .
2. If the **Select Package** dialog box appears, do one of the following to select the package containing the data you want to use in your report:
   - In the **Recently used packages** list, click the package.
   - In the **List of all packages** list, navigate to the package and click it.

Creating a Query Studio Report Without Using Actual Data

You can create a report without accessing the data that will eventually be used in the report. Query Studio's preview mode lets you create or modify reports without retrieving actual data from the database. Instead, simulated data is shown.

For more information about preview mode, see the Query Studio *User Guide*.

You can make preview mode the default for Query Studio. For more information, see "Start Query Studio in Preview Mode" (p. 477).

Create a Report View

You can create a report view, which uses the same report specification as the source report, but has different properties such as prompt values (p. 331), schedules, delivery methods, run options, languages (p. 329), and output formats (p. 326).

Creating a report view does not change the original report. You can determine the source report for a report view by viewing its properties. The report view properties also provide a link to the properties of the source report.

If the source report is moved to another location, the report view link is not broken. If the source report is deleted, the report view icon changes to indicate a broken link , and the properties link to the source report is removed.

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report(p. 224). If you want a report to appear in more than one location, create a shortcut (p. 214).

To create a report view, you must have execute or read permissions for the original report.

Steps

1. In Cognos Connection, locate the report you want to use to create the report view.
2. Under **Actions**, click the report view button next to the report.
3. In the **Name** box, type the name of the entry.
4. If you want, in the **Description** and in the **Screen tip** box, type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 231). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. If you do not want to use the target folder shown under **Location**, click **Select another location** and select the target folder and click **OK**.
6. Click **Finish**.

In the portal, report view entries are identified by the report view icon .

The report view has the same run options and properties as the original entry. To change the default properties of a report view, see "Set Default Report Options" (p. 318). For information about properties, see "Entry Properties" (p. 217).

Edit a Report

You can use the Cognos 8 authoring tools to edit an existing report. You may want to change the report layout, style, or font. The report may need to be updated because of changes to the data or to add language support.

If the report was created in Report Studio, you can edit the report in Report Studio. If the report was created in Query Studio, you can edit the report in either Query Studio or Report Studio. If you edit a Query Studio report in Report Studio, you cannot go back and edit the report in Query Studio. For more information about modifying reports, see the Report Studio Professional Authoring *User Guide*, and the Query Studio *User Guide*.

If the report was created in Analysis Studio, you can edit the report in either Analysis Studio or Report Studio. If you edit an Analysis Studio report in Report Studio, you cannot go back and edit the report in Analysis Studio. For more information about modifying Analysis Studio reports, see the Report Studio Professional Authoring *User Guide*, and the Analysis Studio *User Guide*.

The edit button differs depending on whether the report is a Query Studio report , a Report Studio report , or an Analysis Studio report .

Editing a report modifies the report specification so that everyone who views the report sees the changes you made.

Report properties, such as the preferred output format, language, prompt values, or report retention, can be specified by changing the run options in the portal (p. 318). For information about properties, see "Entry Properties" (p. 217).

If you want to use a generic report as the underlying structure for additional reports, make a copy of the report (p. 224). If you want a report to appear in more than one location, create a shortcut (p. 214). If you want to keep the underlying report specifications but want the choice of another report format, language, delivery method, or run option, create a report view (p. 324).

You must have read and write permissions for the report you are attempting to edit. You must have traverse permissions for the folder containing the report.

Step to Edit a Report in Cognos Connection

- In Cognos Connection, click the open button on the **Actions** menu for the report you want to edit.

The report opens in the authoring tool used to create the report.

Step to Edit a Query Studio Report in Report Studio

- Click the **More** link on the actions toolbar and click **Edit with Report Studio**

Report Formats

You can choose the output format for a report. You may want to view reports in a browser, or you may want the report in a format that is easily imported into another application.

You can choose from the following formats:

- HTML
- HTML fragment
- XHTML
- XML
- PDF
- Excel 2000
- Excel 2000 single sheet
- Excel 2002
- Excel 2007
- delimited text (CSV) format.

You can specify the default format to be used when a report is run (p. 318). All shortcuts to a report acquire the default format from the source entry.

You can specify the report format in the run options page (p. 320), in the report properties (p. 217), or in your preferences (p. 231). When you run a report without specifying run options, the format specified in the report properties is used. When it is not specified in the report properties, the format specified in your preferences is used.

XHTML and some PDF formats are only available when you set advanced run options (p. 321). You can also select multiple formats when you set advanced run options.

To specify the report format, you must have read and write permissions for the report and traverse permissions for the folder that contains the report.

HTML Formats

You can select from the following HTML formats:

- HTML for standard HTML formatting
- HTML fragment if you must imbed the HTML in an existing Web page
- XHTML for HTML that is passed through a parser

To select HTML fragment and XMTML or the number of rows per web page, see "Set Advanced Report Options for the Current Run" (p. 321).

XML Format

XML report outputs save the report data in a format that conforms to an internal schema, xmldata.xsd. You can find this schema file in *c8_location*/bin.

This format consists of a dataset element, which contains a metadata element and a data element. The metadata element contains the data item information in item elements. The data element contains all the row and value elements.

You can create models from reports and other data that conform to the xmldata.xsd schema. This is useful if you want to use a report as a data source for another report, or if you use a database that cannot be read by Framework Manager. In this case, export the data from the data source to an XML file, in conformance with the xmldata schema, and then open the XML file in Framework Manager.

For more information, see the Framework Manager *User Guide*.

PDF Format

Use the PDF format to view and distribute reports in an online book format.

You must have administrator privileges to specify the advanced PDF options.

For more information about setting advanced PDF options, see "Set Advanced PDF Options for a Report" (p. 327)

Set Advanced PDF Options for a Report

Using the advanced PDF options, you can control access to the PDF report output and the report contents.

You must have administrator privileges to the report to use the advanced options.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report you want to run.
2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for a Analysis Studio report.
3. Click the **Override the default values** check box.
4. Under **PDF options**, click **Set**.
5. In the **Set the PDF options** page, select the PDF properties you want for the report, and click **OK**. Here is a list of the properties that are available.

Property	Goal
Orientation	Whether to have portrait or landscape for the report orientation.
Paper size	Set the paper size, such as legal or letter size.
Requires a password to open the report	Set the password to open the report.
Requires a password to access options	Set the password to access report options, and then specify the options you want to make available to users, such as whether to allow printing, modifying the report contents, and copying text.

When you run the report, the PDF settings are applied. For example, if you specified a password to open the report, then users must enter the password before viewing the contents of the report.

Excel Formats

The Excel 2000 format can be viewed with versions of Excel 2000 and later. It supports up to 65,536 rows and multiple sheets. The Excel 2000 format is only available in Cognos 8 when Cognos Application Firewall validation is disabled.

Excel 2000 single sheet format offers improved security. Excel 2000 may have cookies in the URLs to spreadsheets, which could be used to illegally impersonate a user. Excel 2000 single sheet format does not use outgoing URLs. However, there is a limit of 65,536 rows, and page breaks for multiple-author pages are ignored.

Excel 2002 format and Excel 2000 single sheet format also offer the following benefits:

- Both work with SSL protocol.

- Both work with a single signon.

  Secure reports can be accessed without subsequent signons because the system automatically identifies users and provides security information.

- Both work with Netscape 7.01.

- Spreadsheets are contained in a single file for reliable spreadsheet navigation.

The Cognos 8 full date format does not always appear correctly in Microsoft Excel 2000 if it is on a system with a regional setting other than English. This does not occur with Microsoft Excel 2002 or 2003 versions. To fix this, reapply the proper format in Excel.

Excel 2007 format renders report output in native Excel XML format, also known as XLSX, that provides a fast way to deliver native Excel spreadsheets to Microsoft Excel XP, Microsoft Excel 2003, and Microsoft Excel 2007. Users of Microsoft Excel XP and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack, which provides file open and save capabilities for the new format. The output is similar to other Excel formats, with the following exceptions:

- Charts are rendered as static images.

- Row height can change in the rendered report to achieve greater fidelity.

CSV Format

Reports saved in delimited text (CSV) format open in the application associated with the.csv file type, usually Microsoft Excel, Microsoft Windows Wordpad, or Star Office.

Reports saved in CSV format

- are designed to support Unicode data across many client operating systems

- are UTF-16 Little Endian data-encoded

- include a BOM (Byte Order Mark) at the beginning of the file

- are tab-delimited

- do not enclose strings in quotation marks

- use a new line character to delimit rows

- show only the results of a report query. Page layout items, such as titles, images, and paramDisplay values do not appear in the CSV output.

You can modify the CSV output format to suit your environment. For more information about customizing the functionality of Cognos 8, see "Modify Properties for the CSV Output Format" (p. 484).

Report Languages

You can choose the languages for a report. You can specify the report language on the run options page (p. 320), in the report properties (p. 217), or in your preferences (p. 231). When you run a report,

the language specified in the report properties is used. When it is not specified in the report properties, the language in your preferences is used.

You can run a report using the default language (p. 318), select a different language for a single run of the report (p. 320), or select more than one language for a report (p. 321).

You can add multilingual properties for each of the entries in the portal (p. 330). You can specify the default language to be used when a report is run (p. 318).

Selecting a language for your report does not change the language used in the portal. You can change the language used in the portal interface by personalizing the portal (p. 231). All shortcuts to a report acquire the default language from the source entry.

To specify the report language, you must have read and write permissions for the report and traverse permissions for the folder that contains the report (p. 191).

The package used to create the report must contain multilingual data before the report outputs are shown in the selected languages (p. 217).

Report Languages When Using an SAP BW Data Source

When a report runs, the report server connects to the underlying data source to obtain data. When using an SAP BW data source, if the SAP BW server does not support the language associated with your content locale, Cognos 8 checks a locale map for a corresponding locale. If the SAP BW server supports the language for the corresponding locale, this language is used. Otherwise, the report runs using the default language installed on the SAP BW server.

Add Multilingual Properties

You can set multilingual properties for each of the entries in the portal. You can add a name, screen tip, and description for each of the locales defined by your administrator. A locale specifies linguistic information and cultural conventions for character type, collation, format of date and time, currency unit, and messages.

If the entry has multilingual properties defined for the selected language, the entry shows the properties. If the entry does not have multilingual properties defined, they are empty.

For information about changing the language to be used by the portal, see "Personalize the Portal" (p. 231).

Steps

1. In Cognos Connection, click the set properties button next to the entry you want to change.
2. Click the **General** tab.
3. Under **Language**, select a language from the list.

   Languages that already have multilingual properties defined appear at the top of the list above a separator line.
4. If you want, type a description in the **Name**, **Description**, and **Screen tip** box.

The name appears in the list of portal entries. The description appears when you set your preferences to use the details view (p. 231). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.

Tip: To remove multilingual properties for a language, select the language in the list and click **Remove values for this language**.

5. Click **OK**.

Specify the Default Language for a Report

To specify the default language for a report, change the report properties.

Steps

1. In Cognos Connection, click the set properties button next to the report you want to change.
2. On the **Report options** tab, under **Language**, select the default language from the list box and click **OK**.

Specify the Default Prompt Values for a Report

You can use prompt values to specify the range of data included in a report when it is run. For example, you can specify a date range that is a subset of the dates available in the report.

You may be prompted for values if the report author defines prompts in the report or if there is more than one connection or signon. For information about adding prompts to reports, see the Report Studio Professional Authoring *User Guide*, the Query Studio *User Guide*, or the Analysis Studio *User Guide*.

If you are the report author, you can create default prompt values for a report. When the report is run, the data is automatically filtered based on the prompt values that you specify. The user does not have to specify prompt values when the report is run. You may find this useful if most users use the same prompt values each time they run a report.

If you have write access to a report and change the prompt values, those values are saved for everyone running the report after you. If you consistently use prompt values that differ from the majority of users, create a report view of the report (p. 324) in your personal folders.

By default, you are prompted for values each time the report runs. You can change this in the report properties (p. 217) or when you set run options for a report (p. 320).

To set default prompt values, you must have read and write permissions for the report and read or traverse permissions for the folder that contains the report.

Steps

1. In Cognos Connection, click the set properties button next to the report you want to change.

2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, under **Prompt values**, click either **Set** or **Edit**.

   If the report does not have saved prompt values, the run options show **No values saved** and clicking **Set** results in a message indicating that the report does not contain prompts.

3. Select the default value for the prompts and click **OK**.

4. If you want to be prompted each time the report is run, select the **Prompt for values** check box.

   If the check box is selected, you will be prompted for values if the report contains prompts or if you have access to multiple data source connections or signons.

   If the check box is not selected and the report is run interactively, you will be prompted only if there are missing values or if you have access to more than one connection or signon. The report will have missing values if saved prompts or default prompts were specified for the report.

   If the check box is not selected and the report is run in the background, the report fails if prompt values are missing.

5. Click **OK**.

Save Report Output

All report output is stored automatically in Cognos 8. You may also be able to save copies of reports in other file locations:

- in Cognos 8 so that it can be used again and for archive purposes
- outside of Cognos 8 for use in external applications such as web sites and for use by people who don't have access to Cognos 8

You select how to save report copies as a delivery option.

You can also choose how to save a report when you schedule it (p. 269).

Before you can save report output to file locations, your administrator must set up the locations.

For more information about setting up file locations, see "Saved Report Output" (p. 141).

Steps

1. In Cognos Connection, click the run with options button on the actions toolbar to the right of the report you want to run.

2. Click **Advanced options**.

3. Under **Time and mode**, click **Run in the background**, and then click **Now** or **Later**.

4. Under **Delivery**, choose where you want to save your report:

- To save a copy in Cognos 8, click **Save**. Then, click **Save the report** or **Save the report as report view**. If you choose to save as report view, you can a change the name or destination folder of the report view. Click **Edit the options**, make the changes and click **OK**.
- To save a copy outside Cognos 8, click **Save to the file system**. To change the report name, click **Edit the options**. You can also change how file conflict is resolved. Click **Keep existing files** to not overwrite existing files, **Replace existing files** to simply overwrite existing files. Click **Make the file names unique and append a timestamp** or **Make the file names unique and append a sequence number** to avoid overwriting existing files by making new files with unique timestamps or sequence numbers and click **OK**.

5. If more than one file location is defined, select the location where you want to save from the **Location** list.
6. Click **Run**.

View Report Output Versions

Reports are run directly against the data source so that they reflect the latest data. However, viewing the most recent data may not always meet your needs. You may want to view older data. For example, you may want to compare monthly sales volume for a product before and after new features are added.

The report output is saved when a report runs in the background. A report cannot be viewed at the time it is run when it

- runs later
- has multiple formats or languages
- has a delivery method of save, print, or email
- is a burst report

Report output versions are listed by report format (p. 326). By default, the list contains report output versions for the language that is defined in your content locale. If no reports versions are found for that language, report formats for all languages are shown.

If burst keys are used, they appear next to the report format sorted by burst key and then by language.

You can specify how long you want to keep report output (p. 334).

Steps

1. In Cognos Connection, click the view report output versions button next to a report that has multiple output versions.
2. Choose the output version that you want to view:
   - To show report formats in a specific language or all languages, click **Languages** and select from the list.

- To show a different output version, select the version from the **Versions** list.
- To show the current version, click the report format.

Tip: To delete a version that you have write access to, click **Manage versions**, select the versions that you want to delete, click **Delete** and then click the close button to return to the review report output versions page.

3. If you want to download a report output version, click the download icon in the **Actions** column.

   You control the report output formats that are available for download. For more information, see "Customize Report Output Formats in Cognos Connection and Cognos Viewer" (p. 475).

Specify How Long to Keep Report Output

You can keep report output for a specific number of runs or for a specific number of days or months. For example, you can keep the report output for the ten latest occurrences or you can keep the report output for the 2 days or 6 months. You can also choose to keep all report output.

You must have read and write permissions for the entry and read or traverse permissions for the folder that contains the entry.

Steps

1. Click the set properties button next to the entry you want.
2. On the **General** tab, under **Run history**, choose the retention method and type the value:
   - To keep report output for a specific number of occurrences, click **Number of occurrences** and type the number. To save an unlimited number of report outputs, set this value to 0.
   - To keep report output for a specific length of time, click **Duration** and click either **Days** or **Months**. Type the appropriate value in the box.
3. Click **OK**.

Enable an Alert List for a Report

Granting permission for an alert list lets the report user decide whether to be alerted when new versions of the report output become available. Whenever the report is run and report output is saved, the report user is alerted by email as a Bcc recipient. The email contains a link to the latest report output.

The permission to enable an alert list for a report does not extend to a report view associated with the report. You must grant permission for the report view independently.

The alert list is independent of any distribution lists associated with the report (p. 341).

To grant permission for an alert list, you must have write permission.

Steps

1. In Cognos Connection, click the set properties button next to the report for which you want to enable an alert list.
2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, click **Advanced options**, and then click the **Enable alerts about new versions** check box.
3. Click **OK**.

Users can now add their names to the alert list for notifications of the report outputs.

Add Yourself to or Remove Yourself from an Alert List for a Report

By adding yourself to the alert list for a report, you receive an email notification when new versions of the report output are saved. In this way, you can monitor changes in the output of reports that are of interest to you.

In the email, you are included as a Bcc recipient. The email contains a link to the latest report output.

Being on the alert list is independent of any distribution lists associated with the report (p. 341).

You can view and manage the alert lists for a report as a watch item.

You can add yourself to only one alert list per report.

Before you can add yourself to an alert list for a report, the report owner must enable the alert list. To receive alerts, you must have an email address defined in your LDAP security profile or in the **My Preferences**, **Personal** tab.

Steps in Cognos Connection

1. In the portal, locate the report.
2. In the **Actions** column, click **More**.
3. In the **Perform an action** page, click **Alert me about new versions** or **Do not alert me about new versions**.
4. Click **OK**.

In the **My Watch Items** area of the portal, note the change in the watch list.

Steps in Cognos Viewer

1. Open the saved report output.

2. On the toolbar, under **Watch New Versions**, click **Alert Me About New Versions** or **Do Not Alert Me About New Versions**.

Steps to Remove Yourself from Multiple Alert Lists

1. In Cognos Connection, click **My area**, **My Watch Items**.
2. On the **Alerts** tab, select the alerts to delete from the alert list.
3. Click **Remove me from the alert list**.

Watch Rules in Saved Reports

Watch rules are defined in Cognos Viewer by report users so that they can monitor events of interest to them in saved reports. Creating watch rules does not require access to Event Studio.

Tip: Users can view and edit watch rules in a single location from the **My Watch Items** area in Cognos Connection.

Watch rules are based on event conditions that are evaluated when the report is saved, not when the report runs interactively. When the event condition is satisfied, the report user is alerted by email or news item.

The event conditions are created using a numeric measure and can be specified only in saved HTML reports. You can define an unlimited number of conditions for a report. The locale for the conditional report output is the same as the locale for the report that contains the event condition.

Before a user can create watch rules and receive alerts, the report owner must enable watch rules for the report (p. 336).

To create watch rules, the report user must have read and traverse permissions to the report output.

Enable Watch Rules for a Report

Enabling watch rules lets the report user specify conditions in saved HTML report output and receive alerts based on these conditions. Whenever the report is run and report output is saved and the conditions are satisfied, the report user is alerted by email or news item.

For information about creating a watch rule, see "Create a Watch Rule for a Report" (p. 337).

To allow watch rules for a report, you must have write permission for the report.

Steps

1. In Cognos Connection, click the set properties button next to the report.
2. On the **Report** tab for Report Studio reports, the **Query** tab for Query Studio reports, or the **Analysis** tab for Analysis Studio reports, under **Advanced options**, select the **Enable selection-based interactivity in HTML reports** and **Enable enhanced user features in saved output versions** check boxes.

Selecting these options specifies that additional context information is saved with the report output.

3. Click **OK**.

After selecting the advanced options, you must run the report and save the report output in HTML format before users can create watch rules.

Create a Watch Rule for a Report

Use watch rules to monitor user-defined events in saved HTML reports. When the report is saved and the watch rule is satisfied, you are alerted by email or news item.

You can view or edit the watch rules you create for reports by using the **My Watch Items** area of the portal. For more information, see"My Watch Items" (p. 234).

Watch rules can be created only in saved HTML reports. For example, you cannot create watch rules in PDF report output.

You must have read and traverse permissions to the report output.

Steps

1. In the Cognos Connection portal, go to the saved HTML report and open it in Cognos Viewer.
2. In the report, click a numeric data item, right-click, and then click **Alert Using New Watch Rule**.
3. In the **Specify the rule - Alert Using New Watch Rule** page, in the conditional expression that appears, click the down arrow, click the expression you want for the watch rule, for example, `>= (greater than or equal)`, and specify a value in the box.
4. Under **For the selected context**, click the report items to which the rule applies.
5. Click **Next**.
6. In the **Specify the alert type** page, specify how you want to be alerted when the rule is satisfied:
   - To be alerted by email, select the **Send the report by email** check box. If you want to change the email options, click **Edit the options**.
   - To be alerted by news item, select the **Publish a news item** check box. If you want to change the news item options, click **Edit the options**.
7. Click **Next**.
8. In the **Specify a name and description - Alert Using New Watch Rule** page, specify a name, description, and location for the watch rule.

   You can organize watch rules in folders on the **Rules** tab of the **My Watch Items** area of the portal.
9. Click **Finish**.

Modify or Delete a Watch Rule in Cognos Viewer

Watch rules you create in saved HTML reports can be edited and deleted in Cognos Viewer.

For information about creating a watch rule, see "Create a Watch Rule for a Report" (p. 337).

You can also delete and edit watch rules from the **My Watch Items** area of the portal. For more information, see "My Watch Items" (p. 234).

To modify or delete a watch rule, you must have write access to the rule.

Steps

1. Open the saved report output in Cognos Viewer.
2. On the toolbar, click **Watch New Versions** and, while hovering over the watch rule, from the submenu,
   - click **Modify** to edit the watch rule. The **Set properties** dialog box appears. Proceed to step 3.
   - click **Delete** to delete the watch rule.
3. Click the **General** tab to change properties, such as the language, name, and description of the watch rule.
4. Click the **Rules** tab to edit the rules properties, such as the conditional expression for the rule, the items to which the rule applies, and the alert type.

Note that the changes you make to a watch rule in Cognos Viewer are made also in the **My Watch Items** area of the portal.

Disable Selection-based Interactivity

You can disable selection-based interactivity for an HTML report that is viewed in Cognos Viewer to shorten the time that it takes the report to run. After you disable this functionality, you cannot:

- drill up and down in a report
- drill through to other reports
- use Cognos Search
- use conditional report delivery
- use agent notification

If selection-based interactivity is enabled in Cognos Connection, a user can perform drill up and down and drill-through actions in Report Viewer or Query Studio. If selection-based interactivity is disabled in Cognos Connection, the ability to perform drill up and down and drill-through are disabled regardless of how the drill through definitions and settings are authored in Report Studio and Cognos Connection.

Selection-based interactivity is enabled by default.

Tip: You can instead enable or disable selection-based interactivity for the current run only.

Click **Run with options** next to the report and then click **Advanced options**. Click **Enable selection-based interactivity in HTML reports**.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report.
2. Click the **Report** tab for a Report Studio report, the **Query** tab for a Query Studio report, or the **Analysis** tab for an Analysis Studio report.

   Tip: Disabling selection-based interactivity on an Analysis Studio report has no effect.
3. Click **Advanced options**.
4. Clear the **Enable selection-based interactivity in HTML reports** check box.

Note that disabling selection-based interactivity on an Analysis Studio report has not effect.

Exclude Blank Pages in PDF Reports

When you generate a PDF report, all pages, including blank pages are included. You can specify that PDF reports do not include blank pages. This applies to all PDF reports.

You must be a server administrator to exclude blank pages.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Dispatchers and Services**.
3. Click the dispatcher you want.
4. For the **ReportService**, in the **Actions** column, click the set properties button.
5. Click the **Settings** tab.
6. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
7. Select the **Override the settings acquired from the parent entry** check box.
8. In the **Parameter** column, type **rsvp.removeblankpages**.
9. In the **Value** column, type **true**.
10. Click **OK**.

Distributing Reports

You can distribute reports to other users to share information with them. In Cognos 8, you can distribute reports by

- saving them (p. 340) where other Cognos 8 users can access the reports at their convenience
- sending them to users by email (p. 340)
- printing them (p. 341)
- bursting them (p. 341)

You can schedule the distribution of your reports so that recipients receive the reports regularly (p. 269).

Recipients must have read permissions for the report and traverse permissions for the folder that contains the report.

When you attach a report to an email, the report is no longer secured by the Cognos security system.

When sending a report by email, note that if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails. However, if you type the email address manually, read access is not required.

To distribute reports to more than one recipient, you can create distribution lists (p. 341), which contain references to users, groups, and roles. If a recipient is not part of the Cognos security system, you can create a contact (p. 341) for that person and add it to a distribution list.

Saving a Report

You can share a report with others by saving the report in a location that is accessible to other users, such as in the public folders. Public folders typically contain reports that are of interest to many users.

You can save a report when you set options for the current run (p. 320) or you can use advanced report options (p. 321) to save a report in Report View (p. 324).

To share a report that is currently located in your personal folders, copy the report (p. 224), move the report (p. 225), or create a shortcut to the report (p. 214) and save it in the public folders.

For information about saving reports, see Query Studio *User Guide*, the Report Studio *User Guide*, or the Analysis Studio *User Guide*.

Sending a Report by Email

You can share a report with others by sending the report by email. This is especially useful if you want to share the report with a group of people who do not have access to the portal.

You can attach reports to email (p. 321). You can also include a URL to the report in an email. Entries that are sent as attachments to emails are no longer secured by the Cognos security system.

You can disable the use of email attachments. For more information, see "Disable Report Attachments in Email Messages" (p. 488).

To send a report to others by email, both you and the email recipients must have valid email addresses. Also, if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails. However, if you type the email address manually, read access is not required.

Printing a Report

It may be convenient for you to have a printed copy of a report. You may need to review a report when your computer is not available, or you may need to take a copy of a report to a meeting.

You can use run options to print a report and choose a printer (p. 321).

You can set up printers for users to select from. For more information, see "Set Up Printers" (p. 45).

Distributing a Report by Bursting

Bursting is the process of running a report once and then sending the results to recipients, each of whom sees only a subset of the data. Distribute reports by bursting them when you want users to receive or view reports that contain data applicable only to them.

If you distribute burst reports by email, the recipients are specified by the burst options. Note that if you choose the recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails.

If the burst report contains a drill-through link to another report and the burst report is distributed by email, set the email options to include a link to the report. Otherwise, if you include the report in the email, the drill-through links in the burst report will not work.

You can burst reports only if the report author defined burst options for the report.

You can use advanced run options (p. 321) to distribute a report by bursting.

You must have read and write permissions for the report to enable bursting.

Create Distribution Lists and Contacts

Use distribution lists if you want to send a report to more than one recipient at a time. Distribution lists contain a collection of users, groups, roles, contacts, or other distribution lists.

If a recipient is not part of the Cognos security system, you can create a contact for this person. The contacts you create can also be assigned as contacts for reports.

Note that if you choose the email recipient from a list, such as a group, role, or distribution list, you must have read access to both the list and the recipient's email account. Otherwise, the report delivery fails.

To access the directory administration tool, you must have execute permissions for the directory secured feature and traverse permission for the Administration secured function.

Steps for a Distribution List

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Distribution Lists and Contacts**.

   Tip: To remove a distribution list or contact, select the entry and click the delete button.
3. On the toolbar, click the new distribution list button .
4. Type a name and, if you want, a description and screen tip for the distribution list, and click **Next**.
5. If you want to add to the distribution list, click **Add** and choose how to select entries:
   - To choose from listed entries, click the appropriate namespace, and then select the check boxes next to the users, groups, or roles.
   - To search for entries, click **Search** and in the **Search string** box, type the phrase you want to search for. For search options, click **Edit**. Find and click the entry you want.
   - To type the name of entries you want to add, click **Type** and type the names of groups, roles, or users using the following format, where a semicolon (;) separates each entry:

     namespace/group_name;namespace/role_name;namespace/user_name;

     Here is an example:

     Cognos/Authors;LDAP/scarter;
6. Click the right-arrow button and when the entries you want appear in the **Selected entries** box, click **OK**.

   Tips: To remove entries from the **Selected entries** list, select them and click **Remove**. To select all entries in a list, click the check box in the upper-left corner of the list. To make the user entries visible, click **Show users in the list**.
7. Click **Finish**.

You can now choose this list when you specify recipients for a report.

Steps for a Contact

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Distribution Lists and Contacts**.

   Tip: To remove a distribution list or contact, select the entry and click the delete button.
3. On the toolbar, click the new contact button .
4. Type a name and email address for the contact and, if you want, a description and screen tip, and click **Finish**.

Drilling to View Related Data

Reports that you run in Cognos Connection and view in Cognos Viewer support various drill operations so that you can view different layers of related data. You can perform drill operations in lists, crosstabs, and charts.

You can

- drill up or drill down within the same report
- drill through to another target
- drill through to another target passing multiple values

Drill Up or Drill Down

You can drill up and drill down within a report that is run from Cognos Connection. Reports run from Cognos Connection appear in Cognos Viewer.

In lists and crosstabs, hyperlinks identify drillable items. In charts, the pointer changes to a hand when you pause the pointer over a drillable item, and a tooltip indicates what you are drilling on. For example, a column chart shows revenue by product line by year. You can drill on a single axis, such as product line or year. You can also drill on both axes, such as Camping Equipment and 2005. In this case, you are drilling on the intersection of Camping Equipment and 2005.

After you drill up or drill down, you can save the report as a report view for later viewing. For more information, see "Create a Report View" (p. 324).

The drill-up and drill-down functionality is available only when you use dimensionally structured data and view the report in HTML format. You can drill only on members in a level.

By default, the drill-up and drill-down functionality is enabled.

Steps

1. Run the report in Cognos Connection and view it in Cognos Viewer.

   Tip: Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Right-click the report item you want to drill on and click **Drill Up** or **Drill Down** .

Drill Through to Another Target

You can navigate from a report to one of the following targets:

- a Query Studio report
- a Report Studio report
- an Analysis Studio analysis
- a Microsoft SQL Server Analysis Services (SSAS) action

You can also navigate from a report or analysis authored in one package to more detailed information in a report which was authored in another package. For example, this is useful when you want to drill from a summarized OLAP source, such as your sales information, into the detailed relational or transactional information, such as your inventory volumes.

Drilling through from one report to another is a method of passing information from the source (your starting report) to the target (your ending report). For example, you may be evaluating a report and discover something you need to investigate in a certain product line. You can drill through to the detailed target report which provides a focused view of that product line. When drilling through to the target, the product line you selected in the source is passed and the target report is run with that filter, making a more focused report.

By default, the ability to drill through from one report to another is enabled. You can disable it by using the **Enable selection-based interactivity** option. For more information, see "Disable Selection-based Interactivity" (p. 338).

For information about drill-through concepts and setting up drill-through access, see "Drill-through Access" (p. 369).

Before you can navigate to another target, a drill-through definition must be created in either the Report Studio source report or in Cognos Connection.

Steps

1. Run the report in Cognos Connection and view it in Cognos Viewer.

   Tip: Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Right-click the report item from which you want to navigate and click **Go To** , **Related Links**. The **Go To** page appears, showing the available targets.

   Note: If there is only one possible target for the column, the reports runs and appears in Cognos Viewer.

3. Click the target you want to navigate to.

Depending on how the drill-through definition was set up and the report type, the target opens in either Cognos Viewer, Query Studio, or Analysis Studio.

Drill Through to Another Target Passing Multiple Values

You can have a report that contains a drill-through definition that can be filtered by multiple values in a single query item. For example, while analyzing an OLAP source, you may want to focus on Canada and the United Kingdom. When you drill through, the target report is filtered by both countries. After you run the report in Cognos Viewer, you are prompted to choose values when you navigate from the report to the drill-through target. The values you specify are used to filter the results in the target.

For more information about drilling through to a target, see "Drill Through to Another Target" (p. 343).

Drilling through using multiple values is available regardless of whether the drill-through definition is authored in the Report Studio source report or in Cognos Connection, Drill-through Definitions. In previous releases, this functionality was available only when the definition was authored in Cognos Connection.

Steps

1. Run the report in Cognos Connection and view it in Cognos Viewer.

   Tip: Alternatively, you can open an Analysis Studio report or Query Studio report in their respective studios.

2. Ctrl+click to select more than one value in a column.
   - If hyperlinks appear in the column in which you are attempting to select cells, click in the empty area around the hyperlinks.
   - If there are no visible hyperlinks but you know that a drill-through target exists, select the cells you want to use as the filter, regardless of whether they are in the same column. Note that when you select multiple values from different columns, the resulting filter in the target report performs an *and* rather than an *or* operation with the values passed, for example, Canada and Camping Equipment; United Kingdom and Fax.

3. Right-click in one of the selected cells from which you want to navigate, and from the menu that appears, do one of the following:
   - Under **Go To**, click the drill-through target name, if one exists.
   - Under **Go To**, click **Related Links**. On the **Go To** page, click the target report you want to run.

The target report runs and if it can be filtered by the selection made in the source report, the target is filtered by those values.

Series 7 Reports in Cognos Connection

If your administrator configures Cognos 8 to use the Cognos Series 7 namespace, you can see Series 7 entries in Cognos Connection. When you run a Series 7 report, the report runs in the Series 7 application used to create it.

The contents of the Series 7 NewsIndex appears at the bottom of the page in **Public Folders**. The contents of your Series 7 personal NewsBox appears at the bottom of the page in **My Folders**.

Alternatively, PowerPlay 7.3 can be configured to use Cognos Connection rather than Upfront as a portal. However, if you are accessing content from other Cognos applications or versions previous to PowerPlay 7.3, the administrator may still depend on the Upfront portal.

When you access Series 7 entries from Cognos Connection, consider the following things:

- If the Series 7 namespace and the Cognos 8 namespace are different, you must log on to both. Otherwise, you cannot see content in both areas.

- If you log off when you are in Upfront, you can no longer access Series 7 entries in Cognos Connection. You should always log off in Cognos Connection.
- If you belong to several Series 7 user classes, you are unable to select a different user class when you access Upfront through Cognos Connection.
- If you use an Upfront theme other than standard70, an error message may appear when you click the **More** link in the **Actions** column. You cannot access Series 7 entries.
- If you want to cut, copy, and paste Series 7 entries, use the More link in the **Actions** column, and then use the Upfront toolbar.
- If you perform a search in Cognos Connection, the Series 7 entries are not included in the search.
- You cannot combine Cognos 8 entries and Series 7 entries in a single folder or NewsBox.

For information about working with Series 7 entries in Upfront, see the Cognos Series 7 *Web Portal User Guide*.

Series 7 PowerPlay Reports and Cubes

After Series 7 PowerPlay reports and cubes are published to the Cognos 8 portal, you can use PowerPlay authoring tools to create and edit Series 7 PowerPlay reports. For more information about PowerPlay authoring tools, see the PowerPlay Web *User's Guide*.

You can change the default run options of Series 7 PowerPlay reports and cubes (p. 348) and select multilingual properties (p. 349).

Series 7 PowerPlay reports and cubes function differently from other reports. The following actions do not apply to Series 7 PowerPlay reports and cubes:

- viewing the run history and report output versions
- specifying how long to keep report outputs and histories
- canceling and suspending reports
- specifying prompt values for report formats other than PDF
- specifying language for the content of reports
- running a report as the owner
- scheduling reports
- distributing reports

Single Signon

Single signon ensures that users who are logged on to one Cognos application are not prompted for authentication when they run another Cognos application.

You can ensure that your users benefit from single signon by ensuring that both Cognos 8 and PowerPlay use the same Series 7 namespace as their authentication source. Alternatively, you can ensure that the authentication namespaces used for both Cognos 8 and PowerPlay are configured to use an external single signon mechanism for authentication, such as operating system signons for Series 7 PowerPlay or LDAP provider with External Identity Mapping in ReportNet®.

For instructions about setting up Series 7 single signon, see the Access Manager *Administrator Guide*.

For instructions about setting up single signon for ReportNet, see the *Installation and Configuration Guide*.

Run or Open a Series 7 PowerPlay Report

You can run Series 7 PowerPlay reports in the following formats (p. 326):

- If the HTML icon is visible, the report opens in PowerPlay Web Explorer.
- If the PDF icon is visible, the report runs in the PowerPlay Web Viewer.

PowerPlay administrators can restrict who can open cubes. For information about publishing Series 7 PowerPlay reports and cubes in Cognos 8, see the PowerPlay *Enterprise Server Guide*.

If you use secured Series 7 cubes, the namespace against which the cubes are secured must be configured as an authentication source in Cognos 8. This namespace need not be the only authentication namespace or the primary logon for the user. For more information about configuring authentication namespaces see the *Installation and Configuration Guide*.

Before you can run or open Series 7 PowerPlay reports and cubes directly from Cognos 8, you must have both PowerPlay 7.3 and Cognos 8 installed and configured. You also must have the following permissions:

- execute and read permissions to run or open a report or cube
- read and traverse permissions to access the folder that contains the report or cube
- read and write permissions to set properties for cubes and reports

Step

- In Cognos Connection, click the report that you want.

Depending on the default action for the report, the report runs in either PDF format (default) or opens with PowerPlay Web Explorer.

If you have the required permissions, you can change the run options for Series 7 PowerPlay reports and cubes (p. 348). For information about using PowerPlay Web Explorer and PowerPlay Web Viewer, see the Cognos PowerPlay Web *User's Guide*.

Tip: To run any Series 7 PowerPlay report in PowerPlay Web Explorer, click the open with PowerPlay Explorer button in the actions toolbar. You can also click **More** next to the report you want and then open the report in Analysis Studio or Report Studio. The migration tools must already be

installed. For information about installing these tools, see the Cognos 8 Migration and Upgrade Tools *Installation Guide*. When you open the report, it is upgraded to the format of the studio that you opened it in. If you save the report, it is saved in the upgraded format. There may be differences between the original PowerPlay report and the Cognos 8 version of the report. If you do not save the report, it remains a Series 7 PowerPlay report. For more information about upgrading Series 7 PowerPlay reports, see the Cognos 8 Migration and Upgrade *User Guide*.

Change the Defaults for a Series 7 PowerPlay Report

You can change the defaults for Series 7 PowerPlay reports. You can select one of the following default actions when a report is run:

- run the report in PDF format (default)
- open the report with PowerPlay Web Explorer

For HTML format reports, you can choose to open the report in design mode (without data). Opening a report in design mode is useful to quickly view the structure of the report.

For PDF format reports, you can choose to be prompted for values that filter the range of data included in a report. For example, you can specify a date range that is a subset of the dates available in the report. If the Series 7 PowerPlay report was created with prompt values, you are prompted to enter values when the report runs.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar to the right of the report you want to run.
2. Click the **PowerPlay report** tab.
3. Under **Default action**, select the default action for when the report is run.
4. For HTML reports, if you want to open the report without data, design mode, select the **Open in design mode** check box.

   Tip: You can also click the open with PowerPlay Web Explorer in design mode button if it appears in the actions toolbar.
5. For PDF reports, if you want to be prompted for values, select the **Prompt for values** check box.

   Tip: The Prompt for values check box appears only if prompt values are created for the report. You can also click More next to the report you want and then click the run the report in PDF format and prompt for values button .

Open a Series 7 Cube

You can open Series 7 cubes and work with them in PowerPlay Web Explorer.

For more information about using PowerPlay Web Explorer, see PowerPlay Web *User's Guide*.

Step

- In Cognos Connection, click the cube that you want.

Multilingual Properties for Series 7 Reports and Cubes

In Cognos Connection, you can select the multilingual properties of a Series 7 report or cube (p. 330). The name, screen tip, and description uses the language that you select.

The content, data, category labels, and other labels do not change. The language for these items is set by the PowerPlay administrator who creates the report or cube.

Chapter 23: Agents

You can create agents in Event Studio (p. 354) to monitor your organization's data for occurrences of business events, and then perform tasks. For example, tasks can include sending an email, adding information to the portal, and running reports. For more information, see the Event Studio *User Guide*.

After an agent is published to the portal, use Cognos Connection to do the following:

- run the agent (p. 351).
- change default properties. (p. 352)
- create an agent view. (p. 353)
- enable an alert list. (p. 354)
- add or remove yourself from an alert list. (p. 354)
- receive news item headlines (p. 355).
- view a list of the most recent event instances for an agent (p. 356).
- view the run history. (p. 264)
- rerun a failed agent with the initial parameters (p. 266)

You can schedule agents to run at a specified time or based on a trigger, such as a database refresh or an email. You can also view the run history of scheduled agents. For more information, see "Schedule Management" (p. 269).

Run an Agent

Usually, agents run automatically according to the schedule specified by the agent author. However, you can run the agent manually at any time if you want to check for occurrences of specified events and perform specified tasks if those events occur.

For example, an agent is created to send an email to sales staff when they reach 75 percent of their sales quota for the month. The agent prompts for the sales region. A sales manager specifies Spain, and emails are sent only to sales staff in Spain.

You must have execute permission to run an agent. You must have traverse permissions for the folder that contains the agent.

Steps

1. In Cognos Connection, click the run with options button on the actions toolbar next to the agent you want to run.

2. Under **Time**, click **Now** to run the agent now or click **Later** to specify a later date and time.
3. If you want the agent to prompt for values to filter the results it retrieves, under **Prompt Values**, select the **Prompt for values** check box.
4. Click **Run**.

   The confirmation page appears.

   You are prompted for values if the agent specification or model includes prompts or if you have access to multiple data source connections or signons.
5. To view the run history of the agent, select **View the details of this agent after closing this dialog**.
6. Click **OK**.

   The options override the default agent options for the current run only.

Change Default Agent Properties

You can change the defaults that are set for agents in Event Studio, such as whether to use prompt values and run as the owner. If the agent contains one or more tasks with a destination of **My Folders**, and someone other than the owner runs the agent, the task fails unless run as the owner is selected.

You can run an agent (p. 351), create agent views (p. 353), and create and edit agents in Event Studio (p. 354).

You must have execute permissions for the agent. You must have traverse permissions for the folder that contains the agent.

Steps

1. In Cognos Connection, click the set properties button on the actions toolbar next to the agent you want to run.
2. Click the **Agent** tab.

   The tasks in the agent are shown.
3. Under **Default action**, specify the default action for the agent.
4. If you want the agent to prompt for values to filter the results that it retrieves, under **Prompt Values**, select the **Prompt for values** check box. The **Prompt for values** check box appears only if prompt values are created for the agent in Event Studio.
5. If you want the agent to run using the owner credentials, click the check box next to the owner listed under **Run as the owner**.
6. To allow users to add themselves to the alert list for the agent, click the **Allow users to add themselves to the alert list** check box.

7. Click **OK**.

   The next time the agent runs, it uses these properties instead of the original defaults.

Create an Agent View

Agent views share event definition and tasks with the agent but can have different properties, such as prompt values and run as the owner (p. 222).

Creating an agent view does not change the original agent. Except for changes to notification lists, any changes to the original agent are automatically reflected in the agent view. You can determine the source agent for an agent view by viewing its properties. The agent view properties also provide a link to the properties of the source agent.

If the source agent is deleted or moved to another location, the agent view icon changes to indicate a broken link, and the properties link to the source agent is removed.

If you want to change the properties of an agent and do not need to retain an agent with the original properties, change the default agent properties (p. 352). If you want to use a generic agent as the basis for a new agent, make a copy of the agent (p. 224). If you want an agent to appear in more than one location, create a shortcut (p. 214).

To create an agent view, you must have execute or read permissions for the original agent.

Steps

1. In Cognos Connection, locate the agent you want to use to create the agent view.
2. Under **Actions**, click the agent view icon next to the agent.
3. In the **Name** box, type the name of the entry.
4. If you want, in the **Description** and in the **Screen tip** box, you can type a description of the entry.

   The description appears in the portal when you set your preferences to use the details view (p. 231). The screen tip, which is limited to 100 characters, appears when you pause your pointer over the icon for the entry in the portal.
5. If you do not want to use the target folder shown under **Location**, choose another location, click **Select another folder**, select the target folder, and click **OK**.
6. Click **Finish**.

In the portal, agent view entries are identified by the agent view icon .

The agent view has the same run options and properties as the original entry. For information about changing agent properties, see "Entry Properties" (p. 217).

Open or Create an Agent from Cognos Connection

You can open or create agents from Cognos Connection and work with them in Event Studio.

To open an existing agent in Event Studio, do the following:

- In **Public Folders** or **My Folders**, click the agent.

To create a new agent in Event Studio, do the following:

- In Cognos Connection, in the upper-right corner, click **Launch**, **Event Studio**.

For information about using Event Studio, see the Event Studio *User Guide*.

Enable an Alert List for an Agent

By granting users permission to add an alert list to an agent, users can monitor business events that are important to them. With this permission, users can add themselves to the alert list (p. 354) and be alerted by email as a Bcc recipient when the agent runs and the associated tasks are performed.

The permission to add an alert list to an agent does not extend to an agent view associated with the agent. You must grant permission for the agent view independently.

To grant permission for an alert list, you must have execute permission for the agent and traverse permission for the folder that contains the agent.

Steps

1. In Cognos Connection, click the set properties button next to the agent for which you want to enable an alert list.
2. Click the **Agent** tab, and select the **Allow users to add themselves to the alert list** check box.

Emails are sent whenever the agent is run interactively or in the background according to a schedule.

Add Yourself to or Remove Yourself from an Alert List for an Agent

Because an agent monitors important business events, you may want to add yourself to the alert list for the agent. When you subscribe to an alert list, you receive an email notification when the agent is run. You can also view and manage the alert list for the agent as a watch item.

Adding yourself to the alert list of an agent does not automatically add you to the alert list for any agent views associated with the agent. If you want to receive alerts for an agent view, you must add yourself to the alert list for the agent view.

The agent author must include an email task with the agent and enable an alert list for the agent (p. 354).

To add yourself to the alert list of an agent, you must have read and traverse permissions for the agent. You must also have an email address defined in your LDAP security profile or in the **My Preferences**, **Personal** tab.

Steps for One Alert List

1. In Cognos Connection, locate the agent.
2. In the **Actions** column, click **More**.
3. Click **Add me to the alert list** or **Remove me from the alert list** .
4. Click **OK**.

Note the change for the alert list in the watch item list. To view your watch items, from the **My Area** menu, click **My Watch Items**.

Steps to Remove Yourself from Multiple Alert Lists

1. In Cognos Connection, click the my area icon and then click **My Watch Items**.
2. On the **Alerts** tab, select the alerts to delete from the alert list.
3. Click the remove me from the alert list button.

Remove All Users from the Alert List for an Agent

You can remove all users from the alert list for an agent. Any user that is currently on the alert list is removed. For more information about alert lists, see "Add Yourself to or Remove Yourself from an Alert List for an Agent" (p. 354).

You must have set policy permission for the agent.

Steps

1. In Cognos Connection, locate the agent.
2. In the **Actions** column, click **More**.
3. Click **Remove all from the alert list**.

Receive News Item Headlines

The author of an agent can specify that news item headlines be published to a folder in Cognos Connection when an event occurs. To be able to read headlines as an RSS-style list, you must set up a page in Cognos Connection that includes a Cognos Navigator portlet that displays the folder where the headlines are published. Edit the properties of the portlet to view the entries as a news list. For instructions, see "Pages and Dashboards" (p. 237).

For more information about news items, see the Event Studio *User Guide*.

View the Most Recent Event List

The most recent event list compares current data with data from the last time the agent ran and groups events by event status.

For example, an agent is created to tell you when the quantity sold of any product by any sales person in your database changes. The first time the agent runs, the most recent event list identifies all sales as new events.

Product number	Sales person	Quantity sold
NEW EVENTS		
3345	Ashley McCormick	25
3345	Bayard Lopes	15
2256	Alessandra Torta	100

The second time the agent runs, it finds the following product sales.

Product number	Sales person	Quantity sold
3345	Ashley McCormick	35
3345	Bayard Lopes	15
2256	Ashley McCormick	15
2256	Alessandra Torta	150

If you now view the most recent events list, you see the following list:

Product number	Sales person	Quantity sold
NEW EVENTS		
2256	Ashley McCormick	15
ONGOING (UNCHANGED)		
3345	Bayard Lopes	15
ONGOING (CHANGED)		

Product number	Sales person	Quantity sold
3345	Ashley McCormick	35
2256	Alessandra Torta	150

Steps

1. In Cognos Connection, locate the agent you want.
2. Under **Actions**, click the set properties icon.
3. Click the **Agent** tab.
4. Under **Default action**, click **View most recent event list**.
5. Click **OK**.

Chapter 24: Metric Studio Metrics

Users create metrics in Metric Studio, a Web application for managing business metrics by monitoring, analyzing, and reporting them at all levels of the organization. As an administrator, you can configure security, access Metric Studio, create metric packages, run system tasks like scheduling and data loading, and view job history. You do these tasks in Cognos Connection.

For information about administering Cognos 8 security, see "Initial Security" (p. 207).

Create a Metric Package

Before users can use Metric Studio, you must create at least one metric package using the New Metric Package wizard. A metric package is a Cognos Connection representation of a Metric Studio application. A metric package contains connection information, reports, and metric management tasks for that application. The metric package content is stored in a metric store.

You open the New Metric Package wizard from the toolbar in Cognos Connection. Use the wizard to define the metric package name and the data source connection to the metric store. For a new metric store, you also provide the information necessary to initialize the database, including the start and end dates of the fiscal year.

When you create a metric package, it contains several default reports. If Report Studio is installed, you can open these reports in Report Studio. If not, you can open them in Cognos Viewer. For more information about Cognos reports, see "Reports and Cubes" (p. 317).

To create metric packages, you must have execute permissions for the Metric Studio Administration secured feature and traverse permission for the Administration secured function.

Steps

1. Start Cognos Connection.
2. Click the **New metric package** button .
3. Type a name and description for the Metric Studio application to represent this metric package, and click **Next**.
4. Click **New data source**.
5. Type a name and description for the data source connection for the metric store that contains the content for this metric package, and click **Next**.
6. In the **Type** box, click the database type.
7. Select the isolation level, and click **Next**.
8. Specify the information required for your database type:

- For a Microsoft SQL Server database, type the name of the database server and the database. Under **Signons**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, and type the user ID and password of the user account with access to the database.
- For an Oracle database, type the connection string. Select **User ID**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, and type the user ID and password of the user account with access to the database.
- For a DB2 database, type the name of the database, the connection string, and the collattion sequence. Select **User ID**, select the **Password** and **Create a signon that the Everyone group can use** check boxes, and type the user ID and password of the user account with access to the database.

Tip: To test whether the parameters are correct, click **Test**.

9. Click **Next** and then click **Finish**.
10. Click the new data source and click **Next**.
11. Click **Next** and follow the prompts to provide the information necessary to initialize the database. When you see the page that summarizes the data source details and the metric store settings, click **Initialize**.
12. Select **Open this package with Metric Studio after closing the wizard** and then click **Finish**.

Metric Studio opens, and the new metric package appears in Cognos Connection.

Change the Default Action for Packages

The default action when you click a package name is shown by the icon to the left of the package name in the portal.

If the view metric package contents icon is visible, the package contents appear.

If the open with Metric Studio icon is visible , the package opens in Metric Studio. This is the default.

To change the default action of the package, do the following:

- In the **Actions** column, click the Set properties button for the package and select the default action you want.

Run a Metric Task

To run metric tasks, you must have execute permissions for the Metric Studio Administration secured feature and traverse permission for the Administration secured function.

You can run a metric task immediately, or schedule it to run at a later time, or on a recurring basis.

Steps to Run a Task Now

1. In Cognos Connection, in **Public folders** or **My folders**, open the Metric Studio package that you want.

   Tip: Unless you changed the default action for the package, clicking the package name will cause the package to open in Metric Studio.

2. Click **Metric maintenance**, and click the metric task that you want to run.

Steps to Schedule a Task

1. In Cognos Connection, in **Public folders** or **My folders**, open the Metric Studio package that you want.

2. Click **Metric maintenance**, and in the **Actions** column, click the run with options button .

3. Click **Later**, and enter the time that you want the task to run.

   You can also schedule a task to run on a recurring basis, and view a list of scheduled tasks using the Schedule Management tool. For more information, see "Schedule Management" (p. 269).

Delete a Metric Task

You can also modify a metric task.

You must have write permissions or set policy permissions for the task you are attempting to delete. You must also have write and traverse permissions for the current package.

Steps

1. In Cognos Connection, in **Public folders** or **My folders**, select the check boxes next to the tasks you want to delete.

2. Click the delete button on the toolbar.

   A confirmation box appears.

3. Click **OK**.

Modify a Metric Task

If you want to modify an existing metric task to fit you organization's needs, you can customize the options.

Steps

1. In Cognos Connection, in **Public folders** or **My folders**, open the Metric Studio package that you want.

2. Click the set properties button on the actions toolbar to the right of the metric task that you want to modify.
3. Depending on what you want to change, click the **Metric maintenance**, **Metric import**, or the **Metric export** tab.
4. Select or clear the check boxes for the options you want to change.
5. Click **OK**.

Metric Import Tasks

Metric packages have default import tasks available for importing and transferring data. You can run these tasks as they are (p. 360), modify them to fit your organization's needs (p. 361), or create new import tasks (p. 362).

These default tasks are available in your metric package, in the **Metric maintenance** folder.

Import Data From Files Into the Staging Area

You can use this task to load data from tab-delimited files into the staging tables. This is useful when your data is currently maintained in a spreadsheet or database. This task can be run at anytime without changing what is visible in Metric Studio.

Import and Transfer Data From Files Into the Metric Store

You can use this task to load data from all data sources into the staging tables and then transfer it into the metric store. The data will be appear in Metric Studio but no derived values or calculated metrics will be visible. This task also updates the search index.

Transfer Data From the Staging Area Into the Metric Store

You can use this task to move data from staging tables into the metric store. The data in the staging tables can be from imported tab-delimited files, or from another source such as Metric Designer. You can run this task after importing data from files into the staging tables. This task also updates the search index.

Create New Metric Import Task

Use this wizard to create a new task to import data into Metric Studio.

Steps

1. Click the new data integration task button on the toolbar, and then click **New metric import from files**.
2. Type the name and description to represent this new import task and if necessary, change the location to place the task, and click **Next**.

3. Click the **Transfer data from staging area into metric store** to change the pre- and post- import options for the task. Click the options you want to use when the task is run. Click **Next**.
4. Select the action you want:
   - To run now or later, click **Save and run once** and click **Finish**. Specify the time and date for the run. Then click **Run**. Review the run time and click **OK**.
   - To schedule at a recurring time, click **Save and schedule** and click **Finish**. Then, select frequency and start and end dates. Then click **OK**.

     Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see .
   - To save without scheduling or running, click **Save only** then click **Finish**.

Edit Metric Import Task Properties

To edit a metric import task, in the **Actions** column, click the set properties button . Metric import properties appear on the **Metric import** tab of the **Set properties** page.

Property	Description
Import data options: Transfer data from staging area into metric store	Check box to add pre- and post- import data options.
Pre-import data options	Options to clear history and calendar data, and rejected data logs.
Post-import data options	Options to recalculate derived values, send emails from Metric Studio Watchlist, and maintain the search engine index.
Run as the owner	Whether to use the owner credentials (p. 196) when the task is run.

Metric Maintenance Tasks

Metric packages have default metric maintenance tasks available for importing and transferring data. You can run these tasks as they are (p. 360), modify them to fit your organization's needs (p. 361), or create new import tasks (p. 362).

These default tasks are available in your metric package, in the **Metric maintenance** folder.

Clear Staging Area Rejected Data Logs

Use this metric task to clear the rejects tables. The rejects tables are not cleared automatically after you reload the metadata and data. Each time there are rejects, they are added to the tables. You

will need to clear the tables from time to time to prevent them from becoming too large. Do this after you finish troubleshooting and want to begin a new load.

Clear Data Store Metric History and Calendar Data

Use this task to delete actual, target, and user-defined column values. This option also deletes any other calendar-dependent data, such as comments, actions, and mappings from PowerCube cells to metrics. Use this option when you want to change the calendar. You must then re-create the calendar before you can use the metric package again.

Warning: Clearing data store metric history and calendar data completely reinitializes the metric package database. All work will be lost.

Clear Data Store Metric History Data Only

Use this task to delete only actual, target, and user-defined column values.

Recalculate Data Store Derived Values

Use this task to recalculate scores and compute derived values and summary data in the data store. You should run this task after you load data into the data store, or after manually adding data. Concurrent recalculate processes are not permitted. This task also updates the search index.

Synchronize Data Store Users With External Namespace

Use this task to copy user information from an external namespace to the metric store.

Update Search Engine Index

Use this task to maintain the index used for searching in Metric Studio. You should run this task after loading or entering new data, to ensure new objects are indexed for searching.

New Metric Maintenance

Use this wizard to create a new task to maintain your metric data.

Steps

1. Click the new data integration task button on the toolbar, and then click **New metric maintenance**.
2. Type the name and description to represent this new maintenance task and if necessary, change the location to place the task, and click **Next**.
3. Click the options you want to use when the task is run, and click **Next**.
4. Select the action you want:
   - To run now or later, click **Save and run once** and click **Finish**. Specify the time and date for the run. Then click **Run**. Review the run time and click **OK**.

- To schedule at a recurring time, click **Save and schedule** and click **Finish**. Then, select frequency and start and end dates. Then click **OK**.

  Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see .

- To save without scheduling or running, click **Save only** then click **Finish**.

Edit Metric Maintenance Properties

To edit a metric maintenance task, in the **Actions** column, click the set properties button . Metric maintenance properties appear on the **Metric maintenance** tab of the **Set properties** page.

Property	Description
Metric data options	Options to move data from the staging area to the metric store and compute derived values and summary data.
Clear data options	Options to clear history and calendar data, and rejected data logs.
Additional options	Options to send emails from Metric Studio Watchlist, synchronize user information, and maintain the search engine index.
Run as the owner	Whether to use the owner credentials (p. 196) when the task is run.

Metric Export Tasks

The following table describes the metric objects that can be exported using the new metric export wizard, and explains the content that is exported for each object.

Metric object	Content exported
Scorecards	Exports all scorecards in the metric store (does not include associated metrics, reports, or diagrams).
Metric Types	Exports all metric types and metric type properties including equations.

Metric object	Content exported
Metrics	Exports all metrics (does not include metric values, or associated reports, diagrams, or comments). Note that you will need the associated scorecards, metric types, and qualifiers in order to load these metrics into another metric store.
Business Calendar	Exports the Metric Studio business calendar including calendar levels and periods.
Qualifiers	Exports all qualifiers.
Reports	Exports all reports that have been associated with scorecards, metric types, strategies, projects, and metrics.
Diagrams	Exports all diagrams that have been associated with scorecards, metric types, strategies, projects, and metrics.
Actions and Projects	Export all actions and projects that have been associated with metrics.
Strategies	Exports language tables and group associations for the Strategies feature.
Permissions	Exports all permissions that have been set on Metric Studio objects.
Import Sources	Exports flat file and relational import sources that have been defined in Metric Studio.
Metric Designer Import Sources	Exports cube import sources that have been defined in Metric Designer along with their associated time levels and time period mappings, currency mappings, and reportlet dimension selections.
User Defined Columns	Exports user defined column definitions.
Units	Exports any special units you have defined. Examples of default units are Currency and Percent.
Object Links	Exports all links including metric, scorecard, report, diagram, projects, strategies, and so on. You must export links in order for metrics to appear on scorecards and for reports and diagrams to appear on scorecards or metrics.

Metric object	Content exported
Custom URL parameters	Exports any special parameters you have staged against Metric Studio objects for use as URL parameters.
Watch Lists	Exports all watch lists to which you subscribe.

Use the new metric export wizard to create a new task to export metric data to files.

Steps

1. Click the new data integration task button on the toolbar, and then click **New metric export**.
2. Type the name and description to represent the new export task and if necessary, change the location to place the task, and click **Next**.
3. Click to clear the objects you do not want to export, and click **Next**.
4. Select **All data for selected objects**, or choose to export data created or changed after a specified date, and click **Next**.
5. Under **Metrics period**, click **All Values** to export values for the entire time period, or **Values for the period** to export values created during a specified time period. Under **Available value types**, select the values you want to export, and click **Next**.
6. Select the currencies, and click **Next**.
7. Select the format to use when exporting security references.

   Note: Using Cognos 8 security references will execute faster. The Metric Studio 2.2 format exports users and groups by name, requiring directory searching.
8. Click **Next**.
9. Select the languages, and click **Next**.
10. Select an existing metric data archive to export to, or create a new one. Select the character set encoding and decimal separator value, and click **Next**.
11. Review your selected options for the export task, and click back if you want to change any options. When you are ready to proceed with the export, click **Next**.
12. Select the action you want:
    - To run now or later, click **Save and run once** and click **Finish**. Specify the time and date for the run. Then click **Run**. Review the run time and click **OK**.
    - To schedule at a recurring time, click **Save and schedule** and click **Finish**. Then, select frequency and start and end dates. Then click **OK**.

Tip: To temporarily disable the schedule, select the **Disable the schedule** check box. To view the schedule status, see .

- To save without scheduling or running, click **Save only** then click **Finish**.

Change Metric Export Properties

You can edit the properties of a metric export task. For instance, you may want to add a language for your users.

Steps

1. In the **Actions** column, click the set properties button for the metric object that you want to export.
2. Click the **Metric export** tab.

   The metric export properties appear.
3. In the **Run as the owner box**, choose whether to use the owner credentials (p. 196)when the task is run.
4. Click **Update the metric export**.

   The Review the summary page appears, showing the current settings for the metric export.
5. Press **Back** as needed to change the settings.
6. Click **Save**.

Chapter 25: Drill-through Access

Drill-through access helps you to build business intelligence applications that are bigger than a single report. Drill-through applications are a network of linked reports that users can navigate, retaining their context and focus, to explore and analyze information.

Using drill-through access, you can move from one report to another within a session while maintaining your focus on the same piece of data. For example, you select a product in a sales report and move to an inventory report about that product.

Drill-through access works by defining the target report using prompts, and then using information from the source report to provide answers to those prompts. An important part of defining a drill-through path is defining which values to use for each prompt. If a prompt is answered by the drill-through value passed to it, the prompt page does not appear.

In Cognos 8, you can drill through

- between reports created in different packages against different data source types (p. 374)

  For example, you can drill through from an analysis against a cube to a detailed report against a relational data source.

- from one existing report to another report using Report Studio (p. 381)

- between Cognos Viewer reports authored in Report Studio, Query Studio, and Analysis Studio reports

- from Series 7 PowerPlay Web cubes to Cognos 8 reports (p. 387)

- from Metric Studio to other Cognos 8 reports by passing parameters using URLs.

  For more information, see the Metric Studio *User Guide*.

Understanding Drill-through Concepts

Before you set up drill-through access, you must understand the key concepts about drilling through. Knowing these concepts will help you to avoid errors so that report consumers drill through as efficiently as possible.

The target of drill-through access is always a saved report definition. The report can be created in Report Studio, Query Studio, or Analysis Studio.

Drill-through Paths

You can create a drill-through path in a source report in Report Studio, or using **Drill-through Definitions** in Cognos Connection. A drill-through path is the definition of the path that is taken when moving from one report to another, including how the data values are passed between the reports.

Using **Drill-through Definitions**, you can create a drill-through path from any report in the source package to any target report in any other package in Cognos Connection. This type of drill-through definition is stored in the source package and can be used when you want to drill between any combination of Analysis Studio, Query Studio, or Cognos Viewer reports in any package.

For any target report that contains parameters, the target parameters must be mapped to the correct metadata in the drill-through path. This ensures that the values from the source report are passed to the correct parameter values, and that the target report is filtered correctly.

A report-based drill-through path refers to a path created and stored in a Report Studio source report. The path is associated with a specific data column, chart, or cross tab, and is available only when users select that area of the report. The drill-through definition, if it exists, appears as a hyperlink in the source report when it is run.

The report-based drill-through is limited to Report Studio source reports and any target reports. This type of drill-through can be used when you want to pass the data item values or parameter results within a source report to the target report, the results of a report expression to a target report, or a URL link as a part of the drill-through definition.

Drilling Through to Different Report Formats

The settings in the drill-through definition determine how users see the report results. For example, the users may see the reports in Cognos Viewer as an HTML Web page, or the reports may open in Query Studio or Analysis Studio.

Reports can be output as HTML Web pages, as PDF, XML, CSV, or Excel formats. When you define a drill-through path, you can choose the output format. This can be useful if the expected use of the target report is something other than online viewing. If the report will be printed, output it as PDF; if it will be exported to Excel for further processing, output it as Excel or CSV, and so on.

If you define a drill-through path to a report that is created in Analysis Studio or Query Studio, the report can be run and opened in its studio instead of in Cognos Viewer. This can be useful if you expect a consumer to use the drill-through target report as the start of an analysis or query session to find more information.

An example of a this type of drill-through action can be an application where a dashboard style report of high-level data can be drilled through to Analysis Studio to investigate items of interest. The Analysis Studio view can then be drilled through to a PDF report for printing.

Note: Drilling through to Report Studio is not supported for the Express Authoring Mode. The Report Studio Professional Mode does not display data results.

Bookmark References

When you drill through, the values that you pass are usually, but not always, used to filter the report using parameters. Cognos 8 Business Intelligence supports bookmarks within saved PDF reports so that a user can scroll a report to view the relevant part based on a URL parameter. For example, you may define a report with one page per product and add a bookmark of the product number on each page. Report consumers can then select a bookmark to see the product that they want.

When a bookmark in the source report is used in a drill-through definition, it provides the value for the URL parameter. When report consumers drill through using this definition, they see the relevant section of the target report.

Bookmark references are limited to previously run reports that are output as PDF and contain bookmark objects.

Members and Values

Dimensionally modeled data, whether stored in cubes or stored as Dimensionally Modeled Relational (DMR) data, organizes data into dimensions. These dimensions contain hierarchies. The hierarchies contain levels. And the levels contain members.

An example of a dimension is Locations. A Locations dimension may contain two hierarchies: Locations by Organization Structure and Locations by Geography. Either of these hierarchies may contain levels like Country and City.

Members are the instances in a level. For example, New York and London are members in the City level. A member may have multiple properties, such as Population, Latitude, and Longitude. Internally, a member is identified by a Member Unique Name (MUN) (p. 371). The method by which a MUN is derived depends on the cube vendor.

Relational data models are made up of data subjects, such as Employees, which are made up of data items, such as Name or Extension. These data items have values, such as Peter Smith.

In Cognos 8, the methods of drilling through available are:

- Dimensional (member) to Dimensional (member)
- Dimensional (member) to Relational (data item value)
- Relational (data item value) to Relational (data item value)

If the target parameter is a member, the source must be a member and must also be from a conformed dimension (p. 372).

If the target parameter is a value, the source can be either a value or a member. If the source is a dimensional member, you must ensure that the level or dimension is mapped to the target data item correctly in the drill-through definition. The business key from which the member is sourced must match the relational target value, which is most often the business key (p. 373).

Member Unique Names

The member unique name (MUN) is a unique identifier for a member in Cognos reports. It is stored in the report specification when the member is referenced in the report directly. The MUN is used in drill-through between OLAP data sources. The member keys in the MUN for the different OLAP data sources must match.

The MUN is used to find the member in the data source, which is similar to how business keys are used to find records in a table. For example, when you create OLAP dimension Products, you use the Product Line database column as s label for the members in your Product Line level. However, you use the Product Line Code business key from the database table to ensure that all the Product lines are unique in that level. The source value that you used to create the members is used in

combination with the data source name, hierarchy, and level information in the member unique name.

If the MUN changes, members that are directly referenced in expressions, filters, or reports are no longer found. Changes to the MUN may be related to other changes. For example, changes to the hierarchy and level structures may change the level unique name, and changes to the business key values may change the member key path. Other factors that can affect the MUN are application changes during the design stage or over time, Cognos PowerCube category codes that are unpredictably unique, the production environment that has more members than the test environment, or removing the member from the data source.

To avoid potential problems, we recommend the following best practices when you build OLAP data sources:

- Use unique codes and keys within a dimension for the member keys.
- Define your OLAP and relational packages using unique conformed values for the source values (business keys) within similar dimensions or data values where drill-through between applications may be required.
- Ensure that the business keys and dimension metadata structure are the same in the production and test environments.
- Do not change the business keys in Framework Manager in the production environment.
- Resolve the non-unique keys in a dimension in the data source before you build the cube.

  Ensure that there are no duplicate source values in all levels of a dimension before you build a PowerCube. We do not recommend using the tilde character (~) in the category codes.

  For more information, see the section about uniqueness in the Cognos Series 7 *Step-by-Step Transformer*.

Conformed Dimensions

If you work with more than one dimensional data source, you may notice that some dimensions are structured the same, and some are not. The reason that dimensions can be structured differently is that the data sources may serve different purposes.

For example, a Customer dimension appears in a Revenue data store, but not in an Inventory data store. However, the Products dimension and the Time dimension appear in both data stores.

Dimensions that appear in multiple data stores are conformed if their structure is identical for all of the following:

- hierarchy names
- level names
- level order
- internal keys

Drilling through is possible between different dimensional data stores only if the dimensions are conformed, and if the dimension data store is of the same vendor type, such as Cognos PowerCube

as the source and the target. In the previously mentioned example of the Revenue and Inventory data stores, it is possible to define the Products and Time dimensions differently for each data store. However, for drill-through between the Products and Time dimensions to work, their structures must be identical in each data store.

Business Keys

When performing a drill-through from a member to a relational value, the business key of the member is passed. This means that your relational target parameter must be set up using the data item with a matching value, which is most often the business key data item.

For example, employees are usually uniquely identified by an employee number, not by their name, because their name is not necessarily unique. When you drill through from a dimensional member to a relational data item, the value provided is the business key. Therefore, the parameter in the target report must be defined to accept a business key value. The exact logic used to define the business key value supplied depends on the cube vendor. For Cognos PowerCubes, the business key value is the **Source** property defined for the level in Cognos Transformer. Cognos Series 7 Transformer PowerCubes pass the source value if the drill-through flag was enabled before the cube was built. Otherwise, the category code is used.

In Report Studio, you can determine what the member business key is using an expression such as `roleValue('_businessKey',[Camping Equipment])`. This expression is case sensitive.

MSAS 2005 multi-part business keys are not supported in drill-through operations.

Tip: When other users run your drill-through report, you may not want them to be prompted for a business key. In Report Studio, you can build a prompt page with a text that is familiar to the users, but filters on the business key. Your Framework Manager modeler can also set the **Display Item Reference** option for the **Prompt Info** property to use the business key when the data item is used in a prompt.

Drilling Through on Dates Between PowerCubes and Relational Packages

Usually, drilling through from OLAP to relational packages requires that the target report parameter is set using the business key in the relational data. However, this method does not work well for dates. OLAP data sources typically view dates as members, such as Quarter 1 2006, while relational data sources view dates as ranges, such as 1/Jan/2006 to 31/March/2006.

A special feature exists for drilling through between PowerCubes and relational packages. Ensure that the target report parameter is set up using `in_range`. Here is an example:

```
[gosales_goretailers].[Orders].[Order date] in_range
?Date?
```

Also ensure that the drill-through definition maps the parameter at the dimension level and that the PowerCube date level is not set to suppress blank categories. Enabling the option to suppress blank categories in the Transformer model before you build the cube may cause the drill-through on dates to be unsuccessful. This happens because there are missing values in the range.

Drilling Through Between Packages

You can set up drill-through access between different packages. The two packages can be based on different types of data source, but there are some limits.

The following table shows the data source mappings that support drill-through access.

Source data source	Target data source
OLAP	OLAP **Note:** OLAP to OLAP drill through is supported only if the data source type is the same, for example, MSAS to MSAS.
OLAP	Dimensionally modeled relational
OLAP	Relational data **Note:** For more information, see "Business Keys" (p. 373).
Dimensionally modeled relational	Dimensionally modeled relational
Dimensionally modeled relational	Relational
Relational	Relational

Scope

Scope is specific to drill-through definitions created using **Drill-through Definitions** in Cognos Connection. It defines when the target report is shown to the users, based on the items they have in the source report.

Usually, you define the scope of a drill-through path to match a parameter that it passes. For example, for a target report that contains a list of employees, typically you only want to display the report as an available drill through-choice when a user is viewing employee names in a source report. If employee names are not in the source report and the scope was set on the employee name in the drill-through definition, the employee report is suppressed from the list of available drill-through target reports in the **Go To** page.

In report-based drill-through access, where the drill-through path is associated with a specific report column, the column serves as the scope.

Set Up Drill-through Access in a Package

A drill-through definition in Cognos Connection is associated with a source package. You can define drill-through definitions between the reports created in the different Cognos 8 studios, and the reports based on different packages and data sources. The drill-through path defined in the drill-through definition is available to any report based on the source package.

A drill-through definition contains:

- a target report

  The target report is based on any target package in Cognos Connection and can be stored anywhere.

- scope

  Specifies when the target report is shown to the user. For example, when the scope is set to "Product Line", the target report is shown as an available choice in the **Go To** page only when data from "Product Line" is selected in the source report.

- action

  Specifies the run options for the target report.

  The **View most recent report** option should be used with reports that contain bookmark references.

- format

  Specifies the format, such as PDF or HTML, in which users view the target report.

- parameter mappings

  When the target report is referenced in the drill-through definition, all parameters in it are visible. To ensure successful drill-through, the parameters should be mapped to the source package metadata.

- bookmark references

  Use this property when the **Action** property in a drill-through definition is set to **View the most recent report**, and the report contains bookmark references. This option helps the users to find the data they need without running a large report.

  For example, you have a large report scheduled to run on a daily or weekly basis during off hours because of resource considerations. Your users may want to view this report as a target because it contains detailed information on a particular topic, such as the inventory, but you want them to view the saved output rather than run this large report. Using this option and bookmark settings, the user can drill through from another source location based on products to open the saved report to the page showing the product they want to focus on.

- display prompt pages

  Controls when prompts are displayed during the drill-through activity. For example, you may want the prompts to always appear, regardless of whether they are fulfilled or not. Alternatively, you may never want the prompts to appear if they are unfulfilled.

You can specify drill-through paths for packages using **Drill-through Definitions** in Cognos Connection. Any source report created in the package can drill through to targets defined in any other package if the users select information in their source report that is within the scope of the drill-through path. For example, all reports authored in the Great Outdoors Company sample package can access any drill-through definition created in this package.

You can create a new drill-through definition (p. 376), or edit an existing one (p. 378). Before you create a drill-through definition, you must understand some important concepts about drill-through access (p. 369).

The target report must be created before you start creating the drill-through definition in Cognos Connection. Drill-through targets can be reports, analyses, report views, and queries. If you want the target report to be filtered with the values passed from the source, ensure that the target report contains parameters.

Drill-through definitions support both dimensional and relational packages, and are available to Analysis Studio, Query Studio, and Cognos Viewer.

Steps to Set Up Target Parameters

1. Open the target report
2. Create a parameter that will serve as the drill-through column, or that will be used to filter the report.

   For example, to drill through or filter on Product line, create a parameter that looks like this:

   ```
   [Product line]=?prodline_p?
   ```

   Tip: Use the operators `in` or `in_range` if you want the target report to accept multiple values, or a range of values.
3. In the **Usage** box, specify the action to take when the target parameter is not fulfilled as part of a drill-through action.
   - Click **Required** to specify that users must click a value in the source report if the parameter is required, but not fulfilled.
   - Click **Optional** to specify that users do not need to click a value in the source report if the parameter is not fulfilled.
   - Click **Disabled** to specify that the parameter is not used by the drill-through action.

Note: The drill-through definition controls when prompt pages or parameters are displayed.

Steps to Create a Drill-through Definition

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Drill-through Definitions**.
2. Click a package name to create a new drill-through definition for that package.

   This package is considered the source package and the drill-through definition you are creating will be available by default to any report in this package.
3. Click the new drill-through definition button on the toolbar.
4. Type a name for the drill-through and, if you want, a description and screen tip. Click **Next**.
5. Set the scope and target, and click **Next**.

   The scope specifies whether the target report in the drill-through definition is available to the user in the **Related Links** page. If you want to make the target report available regardless of

what is included in the report, in the **Set the scope** page, click **Entire package**, which is the default setting for scope. For more information, see "Scope" (p. 374)

The target report can be based on any package in Cognos Connection, but when drill-through definitions cross packages, you must consider the data types used in both the source and the target, and ensure that the created parameters are appropriate for your scenario. For more information, see "Conformed Dimensions" (p. 372) and "Business Keys" (p. 373).

The target report can be located anywhere in Cognos Connection. The user must have execute permissions for the report to use it in a drill-through.

6. Specify the target details.

   - In the **Action** section, specify the action for a drill-through link.

     The default action is to run the target report, analysis, or query.

     If you change the action to **View most recent report**, you do not need to map the target parameters to the source package metadata. The **Display prompt pages** property will be disabled because you will be using a previously run report. Running the report requires that the target report parameters are mapped to the source package metadata.

     If you change the default action to open with Analysis Studio or Query Studio, you must also map the target report parameters to the source package metadata.

   - In the **Prompt Values** section, specify parameter values.

     Every parameter that exists in the target report should be mapped to the appropriate source package metadata in order for the drill-through to successfully filter the target report with data from the source report.

     If you do not map target parameters to the source package metadata, the source report does not pass anything to the target parameter. If your target report is not receiving any parameters, check the mapping in your drill-through definition, and ensure that your parameters were created against the correct data type for your drill-through scenario. For example, if you want to create a drill-through definition from an OLAP package to a target report based on a relational package, your target parameters need to be set up to a query item that has the same value as the OLAP business key.

     For more information, see "Members and Values" (p. 371).

   - In the **Display prompt pages** section, specify when the prompt pages will appear.

     Only when required parameter values are missing

     The prompt pages are not displayed when the required parameter values are provided by the drill-through definition. This is the default.

     Always

     The prompt pages are always displayed when the drill-through action occurs, regardless of whether values were specified for the required parameter values.

     Based on the default prompt settings of the target report

The prompt pages are displayed or not displayed depending on the prompt settings of the target report specified by the **Prompt for Values** check box in Cognos Connection - Report Properties - **Report** tab.

- Click **Bookmark References** to specify a bookmark reference to pass to the target report.

  Tip: Use this option only when the target report is a previously run PDF report that has bookmarks.

- Click **Finish**.

Steps to Edit an Existing Drill-through Definition

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Drill-through Definitions**.
2. Click a package name to view its drill-through definitions.
3. Click the set properties button on the actions toolbar to the right of the drill-through definition that you want to modify.
4. Click the **Target** tab.
5. Make the necessary modifications, and click **OK**.

Set Up a Drill-through Target in Analysis Studio

You can create a drill-through target analysis and add target parameters in the analysis by setting a dimension or a level as the **Go To** parameter. Set the dimension as the **Go To** parameter for drill-down and drill-through within the dimension. This will allow you to perform a drill-down or drill-through action, but only the level, which is currently in your view, is passed. This applies to any query, report, or analysis used in Cognos 8 drill-through action. A source report can then pass the current selection of values to the target analysis.

You can set multiple parameters in an analysis target. However, you cannot pass members within a selection set in Analysis Studio.

Steps

1. In Analysis Studio, create a cross-tab analysis using the package that was set up for drill-through analysis.
2. If you want, add as a row or column the data item that you want to be the prompt.
3. Move or add the dimension or level that you want to be a target parameter to the **Context** area.

   Note: You cannot pass members within a selection set in Analysis Studio.
4. View the list for the item in the **Context** area and click **Use as "Go To" Parameter**.
5. Save this analysis as your target report in Cognos Connection.

   You can now create the drill-through definition under a source package.

When you create the drill-through definition (p. 374) and use the cross-tab analysis as a target, the **Go To** parameter item in the analysis appears as a drill-through parameter. You can map to this parameter the same way that you drill through to Report Studio or Query Studio reports.

Debugging a Drill-through Definition

Cognos 8 includes a debugging functionality that you can use to find problems with your drill-through definitions created in Cognos Connection, and to correct any drill-through errors. It can also help you understand how the drill-through functionality works, especially across different types of data sources. This functionality is also referred to as the Drill-through Assistant.

The Drill-through Assistant provides the following information:

Passed Source Values

Shows the values selected by the user when invoking the drill-through action that are available for passing to the target report. For example, if you drill through from a source in Analysis Studio, you see the values at the intersection you selected prior to the drill-through action, as well as any values in the context area. The values in the debug list are the values in the source report that were not transformed by any drill-through operation.

- Display Value

  Shows the value that users see when using this data item or this member. For OLAP members, this is the member caption or label. For example: `Telephone` is a member from the `Order Method` dimension.

- Use Value

  Shows the value that Cognos reports and analyses use when retrieving the data item or the member. For OLAP members, this is the member unique name (MUN). For example: `[great_outdoors_company].[Order Method].[Order Method].[Order Method1]->:[PC].[@MEMBER].[2]` is the MUN for the `Telephone` member in the `Order Method` dimension.

Target Mapping

Shows the name of the parameter that was mapped in the drill-through definition, and the values that the source is attempting to pass to that parameter.

- Parameter Name

  Shows a list of valid target parameters mapped in the drill-through definition to receive information from the query item, level, or hierarchy on which you performed the drill-through action.

  You can see only parameters for which there is a valid mapping and only the names of the parameters. For example, if the target report contains a parameter for `Product Type` and the drill-through definition maps that target parameter to the source `Product Type` level metadata, you see this target parameter only if you attempt to drill through on the `Product Type` level in the source report. Drilling through on the `Product Line` level does not display this parameter target.

You must ensure that the target parameters in your drill-through definitions are mapped correctly. Incorrectly mapped parameters can receive information from the wrong source metadata, especially where you have data values that are not unique. If you cannot see any target parameters or the parameters you expected to see in the **View Target Mapping** list, check the parameter mapping in the drill-through definition.

- Display Value

  Shows the value that users see when using a data item or member. For OLAP members, this is the member caption or label. For example: `Telephone` is a member from the `Order Method` dimension

- Use Value

  Shows the transformed value that the drill-through definition uses when passing a data item value or member to the target parameter.

  OLAP members passed to relational target parameters obtain the business key from the members MUN and pass only the business key. Using the above example of the `Telephone` member in `Order Methods`, the business key is `2`. If you are unsure of what the business key is for a member, you can write a Report Studio expression such as `roleValue('_businessKey', [member])`. This value is passed to the target parameter.

  OLAP members passed to a target parameter based on another OLAP package of the same OLAP type show a transformed MUN. Using the above `Order Methods` example, the MUN is now transformed and the drill-through definition uses the value of `[great_outdoors_company].[Order Method].[Order Method].[Order Method1]->[Order Method1]. [2]:[PC].[@MEMBER].[2]`. The middle portion of `[Order Method1][2]` is where the drill-through definition finds the correct member in the target when the OLAP data sources are different. To see the MUN for a specific member, you can look at the properties of the member in Report Studio and look at the `Member Unique Name` property.

Access the Drill-through Assistant

You can use the Drill-through Assistant for debugging purposes when you work with drill-through definitions in Cognos Connection.

To use the this functionality, you must have the required permissions for the **Drill Through Assistant** secured function in Cognos Administration(p. 199).

Steps

1. Select a link in your source report, right-click the link, and select **Go To, Related Links**.

   The **Related links** page is displayed with the list of available target reports. If your target report is not shown, review the scope settings in your drill-through definition.

2. Click **View passed source values** to see the values that are available for passing by the source report.

3. Next to the target report, click the down arrow and choose one of the following options:

   - **Run the report**

Runs the target report.

- **View Target Mapping**

  Shows the valid mapped parameters for the available source values, and the use and display values that the drill-through definition will receive.

Example - Debugging a Drill-through Definition

Your OLAP source has a Products dimension with the levels Line, Type, and Name. You have defined a parameter in your relational target to match each level of that OLAP source dimension. You can have a situation where you see all target parameters from a single dimension displayed in the **View Mapped Target** list. This is likely because the individual target parameters are mapped to a single dimension in the drill-through definition, in this case the Products dimension. In your OLAP data source, you have a business key value, or the source value used to create the members, that is duplicated in all three levels.

Parameter Name	Display Value	Use Value
Prod Line Param	Camping Equipment	1
Product Type Param	Cooking Gear	1
Product Name Param	Trail Chef Water Bag	1

Having all three parameters mapped to the Products dimension is correct if the use values are not duplicated in the dimension. In the above table, you can see that members from all three levels have the same use value. In this case the drill-through operation cannot determine which level is the correct one because the scenario indicates that all levels are valid. In this situation, the first level encountered with a valid business key or use value is fulfilled by the drill-through definition. This can result in unexpected behavior.

This example shows why it is important to always ensure that your data warehouses and OLAP sources are designed with unique business keys or source values. To correct this situation, the drill-through definition should have each individual target parameter mapped to each associated level in the source metadata rather than in the dimension.

Set Up Drill-through Access in a Report

Use Report Studio to create a source drill-through report to link two reports containing related information. You can then access related or more detailed information in one report by selecting a value or multiple values in the source report. You can also drill through within the same report by creating bookmarks.

If you are using an SAP BW data source for the target report, and if the target report contains a variable for a hierarchy node, values from the source report can only be values of the data item that represents the leaf-level identifier in the hierarchy.

Before you begin, ensure that you have a report that will serve as the source report and another report that will serve as the target report. The target report must contain one or more parameters that represent the drill-through data items. For more information, see the Report Studio *User Guide*.

Tip: If you want to use a Report Studio report as a source in a drill-through definition in Cognos Connection, open the report, and from the **Data** menu, click **Drill Behavior**, and then select the **Allow package based drill-through** check box.

Steps

1. Open the target report.
2. Create a parameter that will serve as the drill-through column or that will be used to filter the report.

   For example, to drill through or filter Product line, create a parameter that looks like this:

   [Product line]=?prodline_p?

   Tip: Use the operators `in` or `in_range` if you want the target report to accept multiple values or a range of values.
3. In the **Usage** box, specify what to do when the target parameter is not fulfilled as part of a drill-through:
   - To specify that users must click a value in the source report, click **Required**.

     If the parameter is not fulfilled and it is required, users are prompted to choose a value.

     Note: Drill-through definitions that have been authored inside a Report Studio report appear to the consumer as a blue hyperlink. Clicking the hyperlink is how they drill through to the target report and select the value they want passed to the target.

     A consumer can choose to select multiple items within a single column and when the drill-through target report is run, the values from each row selected will be passed to the target parameters. This occurs as an *and* condition.
   - To specify that users do not need to click a value in the source report, click **Optional**.

     Users are not prompted to choose a value if the parameter is not fulfilled. The value will be unfiltered.
   - To specify not to use the parameter, click **Disabled**.

     The parameter is not used during the drill-through.
4. To create other parameters, repeat steps 2 to 3.
5. Open the source report.
6. Click the element in the report that will serve as the drill-through object.

   You can select a data item that your report users are likely to choose to drill on for more detailed information, such as an Employee Name data item. When defining the drill-through path in Report Studio, you can choose to pass a value from a different data item hidden from the user for display purposes, but still in the query. For example, your users see the Product Name data

item and can drill through on that item but the drill-through definition passes the Product Number value for that particular product name that the user has chosen.

Tip: If you are passing only parameter values to the target report, you do not have to drill on a data item. Instead, you can drill on any object in the report, such as the report title. This means that you can drill from outside the context of a query.

7. Click the drill-through definitions button or from the **Properties** pane, double-click the **Drill-Through Definitions** property.
8. Click the new drill-through definition button.

   A drill-through definition is created.

   Tip: To change the drill-through name, click the rename button, type the new name, and click **OK**.
9. On the **Target report** tab, click the ellipsis (...) button next to the **Report** box, and select the drill-through target report.
10. Under the **Parameters** box, click the edit button .

    Each required and optional parameter defined in the target report appears in the **Parameters** dialog box.
11. For each parameter, click **Method** and do one of the following:
    - To specify not to pass any value, click (**Default**).

      That is, the default method is to not pass any value.
    - To specify not to use this parameter, click **Do not use parameter**.

      The target report is not be filtered by this parameter.
    - To pass values from a data item, click **Pass data item value**, click **Value**, and then click the data item that you want.

      Values for the selected data item are passed to the target report.
    - To pass values from a source report parameter, click **Pass parameter value**, click **Value**, and then click the parameter that you want.

      Values for the selected parameter are passed to the target report.
12. Click **OK**.
13. In the **Action** box, decide how the target report will be viewed when users click the drill-through column in the parent report:
    - To run the target report, click **Run the report**.

      Run the target report when you want to see the latest data.
    - To view the most recently saved output version of the target report, click **View the most recent report**.

      Saved output versions are created in Cognos Connection.

- To use the default action specified for the report in Cognos Connection, click (**Default**).

14. If you chose to run the target report in the previous step, in the **Format** box, click the output format you want for your report.

    Tip: Click (**Default**) to run the report using the default format specified for the report in Cognos Connection.

15. If you want the target report to appear in a new window, select the **Open in new window** check box.

16. In the **Display prompt pages** box, decide whether to display prompt pages:

    - To always display prompt pages when the drill-through action occurs, regardless of whether values were specified for the required parameter values, click **Always**.
    - To use the prompt settings of the target report (specified by the **Prompt for Values** checkbox in Cognos Connection - Report Properties - Report tab) to determine whether to show the prompt pages, click **Based on the default prompt settings of the target report**.
    - To not display prompt pages when the required parameter values are provided by the drill-through definition, click **Only when required parameter values are missing**. This is the default.

The drill-through object appears as a blue hyperlink in the report. This drill-through action can also be started by clicking the **Go To** button . When users run the source report, they can click the object to drill through to the target report. If more than one target report is available, the **Go To** page appears with the list of available targets.

Tip: If you run the target report directly, you are prompted to select a value for the report to run on.

Specify the Drill-through Text

You can specify the drill-through text that appears when users can drill through to more than one target. For example, if users from different regions view the report, you can show text in a different language for each region.

Steps

1. Right-click the drill-through object and click **Drill-Through Definitions**.
2. If more than one drill-through exists for the object, in the **Drill-Through Definitions** box, click a drill-through definition.
3. Click the **Label** tab.
4. To link the label to a condition, in the **Condition** box, do the following:
    - Click **Variable**, and click an existing variable or create a new one.
    - Click **Values**, and click one of the variable's possible values.

5. In the **Source type** drop-down list, click the source type you want to use.
6. If the source type is **Text**, click the ellipsis (...) button beside the **Text** box and type the text you want.
7. If the source type is **Data Item Value** or **Data Item Label**, click **Data Item**, and click a data item.
8. If the source type is **Report Expression**, click the ellipsis (...) button beside the **Report Expression** box and define the expression.
9. If the label is linked to a condition, repeat steps 5 to 8 for the remaining possible values.
10. Click **OK**.

When users run the source report and click a drill-through link, the **Go to** page appears. The drill-through text you specified appears for each target. If you did not specify the drill-through text for a target, the drill-through name is used.

Example - Create a Drill-through Report

You are a report author at The Great Outdoors Company, which sells sporting equipment. You are requested to create a report that lists product sales by order method for each product line, and allows users to drill through from the sales report to view the product details for any item selected. You will create two reports, one that contains the details for the item, and another that lists the product sales for the order methods selected by users.

Steps

1. In the Cognos Connection **Welcome** page, click the **Launch** link, and then click **Report Studio**.
2. Select the package **GO Data Warehouse (query)**.
3. In the **Welcome** dialog box, click **Create a new report or template**.
4. In the **New** dialog box, click **List** and click **OK**.
5. In the **Insertable Objects** pane, on the **Source** tab , add the following data items to the list by double-clicking them:
   - **Order method**
   - **Product line**
   - **Product type**
   - **Product name**
   - **Introduction date**
   - **Product image**

   Tip: You can find these data items in the **Order method** and **Product** folders.
6. Group the **Order method**, **Product line**, and **Product type** columns.

7. Click the filters button .
8. Click the add button, and type the following in the **Expression Definition** box:

   [Product name]=?p_PN?
9. Click **OK**.
10. Repeat steps 8 to 9 to create the following filter:

    [Order method] in ?p_OM?
11. Change the title of the report to **Product Details**.
12. Save the report as **Product Details**.
13. From the **File** menu, click **New** to create a new report.
14. In the **New** dialog box, click **List** and click **OK**.
15. In the **Insertable Objects** pane, on the **Source** tab, add the following data items to the list by double-clicking them:
    - **Order method**
    - **Product line**
    - **Product type**
    - **Product name**
    - **Quantity**
    - **Revenue**

    Tip: You can find these data items in the **Sales fact** and **Product** folders.
16. Group the **Order method**, **Product line**, and **Product type** columns.
17. Click the filters button .
18. Click the add button, and type the following in the **Expression Definition** box:

    [Order method] in ?p_OM?
19. Click **OK**.
20. Right-click the **Product Name** column and click **Drill-Through Definitions**.
21. Click the new drill through button .
22. Under **Report,** click the ellipsis (...) button and select the **Product Details** report you created previously.
23. Click **Action** and click **Run the report**.
24. Click **Format** and click **HTML**.

25. Click the edit button .
26. For the item **p_OM**, under **Method**, select **Pass parameter value**, and select **p_OM** for the **Value**.
27. For the item **p_PN**, under **Method**, select **Pass data item value**, and select **Product name** for the **Value**.
28. Click **OK** twice.
29. Change the title of the report to **Product Revenue by Order Method**.
30. Save the report as **Product Revenue by Order Method**.
31. Click the run report button .

When the report runs, you are prompted to select one or more order methods. When you click **OK**, the list shows the product names as clickable links. When you click a product name, the second report runs, showing the order method that was selected in the prompt page of the source report and the product (the source report's column value) selected in the first report.

Drilling Through from Cognos Series 7 to Cognos 8

You can set up drill-through access from Cognos Series 7 to Cognos 8. Specifically, you can drill through to a Cognos 8 report from a PowerPlay Web report or Cognos Visualizer report. Drill through is supported for both PowerCubes and third-party cubes.

You must complete steps in both Cognos Series 7 and Cognos 8 to enable drill through. Refer to the Cognos Series 7 documentation for the specific steps you must complete in the Cognos Series 7 components. Cross references to the appropriate Cognos Series 7 documents are included below.

Setting Up Drill-through Access from PowerPlay Web

Setting up drill-through access from PowerPlay Web to Cognos 8 involves

- for PowerCubes, specifying drill-through targets for Cognos 8 reports in the Transformer model

  For more information, see the Transformer documentation.

- for third-party cubes, specifying drill-through targets for Cognos 8 reports in PowerPlay Connect.

  For more information, see the PowerPlay OLAP Server Connection Guide.

- configuring drill-through access in PowerPlay Server Administration

  In addition to enabling drill-through access to Cognos 8, you must specify the location of the Cognos 8 server and the Cognos 8 folder that contains the target reports. For more information, see the PowerPlay *Enterprise Server Guide*.

- selecting the filters to add to the target report

  In PowerPlay Enterprise Server Administration, enable and use Cognos 8 Assistance to identify the filter expressions required in the target report. For more information, see the PowerPlay *Enterprise Server Guide*.

- creating and testing the target report (p. 388)

Setting Up Drill-through Access from Cognos Visualizer

Setting up drill-through access from Cognos Visualizer to Cognos 8 involves

- specifying the Cognos 8 target and selecting the filters to add to the target report

  You must configure drill through to Cognos 8 for individual Cognos Visualizer reports. For more information, see the Cognos Visualizer *User Guide*.

- creating and testing the target report (p. 388)

Create and Test the Target Report

The target report must be based on a published package that contains the metadata items that you want to filter on, or contains items that are mapped to those metadata items.

When you create the target report, ensure that the names of the parameters you add are identical to the parameter names listed in the **Drill Through Assistant** page in Cognos Series 7. However, the metadata item that you use in the target report for that parameter name does not have to be the identical label. The data values between the target parameter and the source value shown in the drill assistant must match. You may also need to change the type of operator in the target parameter from what is recommended in the **Drill Through Assistant**. For example, if the assistant recommends an = operator but you want to pass a date range, you should change the parameter operator in the target to `in_range`.

Steps

1. Start Report Studio and create a new report.
2. Add the data items and other objects you want.
3. From the **Data** menu, click **Filters** .
4. In the **Detail Filters** tab, click the add button.
5. In the **Expression Definition** box, create the parameterized filter you want by typing the filter expression.
6. Click **OK**.
7. In the **Usage** box, click **Optional**.

   If you do not make the filter optional, a prompt page appears when you drill through to the report.
8. Repeat steps 4 to 7 for other parameterized filters you want to add.
9. Save the report.

   The report name must match what you specified as a target in the PowerCube, third-party cube, or Cognos Visualizer report.

10. Test the drill through in the PowerPlay report or Cognos Visualizer report.

Chapter 26: Managing Portlets and Styles

Portal administration in Cognos 8 includes managing portlets (p. 391) and styles (p. 399). Typically, these tasks are performed by portal administrators (p. 208).

To access the portal administration area in Cognos Administration, you must have execute permissions for the **Styles and portlets** secured feature, and traverse permissions for the **Administration** secured function (p. 199).

For information about troubleshooting, see the Troubleshooting section in this guide.

For information about configuring portal services, see the *Installation and Configuration Guide*.

Portlets

A portlet is a mechanism for displaying Web content as part of a portal page.

The portlets supported by Cognos Connection include Cognos portlets (p. 391) and third-party portlets (p. 394). The Cognos portlets are available to users by default. If you want to make other portlets available, you must import them.

Managing portlets involves the following tasks:

- Importing portlets (p. 394)
- Controlling access to portlets (p. 395)
- Configuring the portlet cache (p. 396)
- Modifying portlets (p. 397)

As an additional task, you may want to change the dispatcher settings to allow the HTML code to be executed in RSS Viewer and Cognos Navigator(p. 398).

For information about using portlets in Cognos Connection pages, see "Pages and Dashboards" (p. 237).

Cognos Portlets

Portal Services provides portlets that users can add to their personal pages in Cognos Connection (p. 237), or in an existing enterprise portal (p. 403).

All Cognos portlets conform to the Web Services for Remote Portlets (WSRP) standard. Users can interact with the portlets without installing Cognos products on their computers.

The Cognos content that appears in the portlets, such as reports, or metrics, and the ability to perform specific actions on that content depend on the users' access permissions. Users must have the required access permissions for the individual entries and for the Cognos 8 secured functions and features. For more information, see "Securing Functions and Features" (p. 199).

The following portlets are available.

Cognos Content Portlets

These portlets provide Cognos content in Cognos Connection or in your existing enterprise portal. By default, these portlets are available in **Cognos Administration**. They can also be deployed to other portals.

The following portlets are available in this group:

Portlet	Description
Cognos Navigator (p. 655)	Shows the Cognos Connection folder hierarchy. Users can browse the hierarchy and open Cognos 8 entries.
Cognos Search (p. 657)	Provides a search tool to help users find published Cognos reports and other entries, and open them.
Cognos Viewer (p. 659)	Opens a default report or lists reports that users can open.

Cognos Utility Portlets

The Cognos Utility portlets provide additional functionality for pages in Cognos Connection. By default, these portlets are available in **Cognos Administration**. However, they cannot be deployed to third-party portals.

The following portlets are available in this group.

Portlet	Description
Bookmarks Viewer (p. 667)	Registers and shows active Web links.
HTML Viewer (p. 668)	Inserts any Web page into a Cognos Connection page.
Image Viewer (p. 669)	Inserts an image and shows it in a page.
RSS Viewer (p. 670)	Shows the content of a Real Simple Syndication (RSS) 1.0 or 2.0 news feed. RSS is a format for syndicating news and is used by many Web sites. An RSS news feed is specified by a URL address.
HTML Source (p. 671)	Use to add custom text and images to a page.

The Cognos Extended Applications Portlet

The Cognos Extended Applications portlet (p. 664) provides access to custom applications created using the Cognos Extended Applications toolkit and the Cognos 8 Software Development Kit.

If Cognos 8 Software Development Kit is installed, this portlet is automatically registered and available in **Cognos Administration**. It can also be deployed to other portals.

For information about creating extended applications, see the *Developer Guide*.

The Metric Studio Portlets

The Metric Studio portlets provide the capability to view performance metrics in a page. The metrics are created using Metric Studio.

If Metric Studio is installed, these portlets are automatically registered and available in **Cognos Administration**. They can also be deployed to other portals.

The following portlets are available in this group:

Portlet	Description
Metric List (p. 664)	Use to add performance metrics to a page. You can configure the portlet to show the following types of metric lists: • **Watch list** Contains the metrics that a user wants to monitor closely. • **Accountability list** Contains the metrics that a user owns. • **Scorecard or strategy list** Contains metrics associated to a strategy. The metrics can be grouped into scorecards.
Metric History Chart (p. 666)	Use to add a metric history chart to a page. The history chart is a graphical illustration of the historical performance of a metric.

For more information, see the Metric Studio *User Guide*.

Dashboard Portlets

The dashboard portlets provide the framework and content for the dashboard pages in Cognos Connection.

Portlet	Description
Multi-page (p. 673)	Use to create a dashboard with multiple pages.

Third-party Portlets

The third-party portlets include non-Cognos portlets that conform to the Web Services for Remote Portlets (WSRP) standard, such as Oracle portlets, or Sun portlets. Because WSRP is a new standard for remote portlets that is still in the process of implementation by many vendors, Cognos is not able to explicitly verify or support all such portlets.

The single signon for third-party portlets may not be available because this functionality is outside the scope of the WSRP standard.

Third-party portlets must be imported into Cognos Connection (p. 394).

Import Portlets

You can import third-party portlets(p. 394) into Cognos Connection if the portlets conform to the WSRP standard.

This procedure is not necessary for Cognos portlets because they are automatically registered and available in Cognos Connection if the applicable Cognos component, such as Metric Studio or Software Development Kit, is installed.

Steps

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Portlets**.
3. Click the import portlets button .

   The **Specify a producer Web service** page appears.
4. Choose the producer Web service.
   - If a Web Services Description Language (WSDL) definition file exists, in the **Web Service Description** box, type its URL address.

     Here is an example:

     http://wsrp.netunitysoftware.com/WSRPTestService/WSRPTestService.asmx?Operation=WSDL
   - If a WSDL definition file does not exist, click **Web Services for Remote Portlet (WSRP) interfaces**, and type the URL required by the portlet producer.

   Tip: To import the Cognos portlets, click **Cognos producer**, and choose the available group.
5. Click **Next**.
6. If the **Specify the registration properties** page appears, provide the registration information as required, and click **Next** again.
7. In the **Specify a name and description** page appears, do the following:
   - Type a name and, if you want, a description and a screen tip for the portlet group.

- Choose the portlets to import by selecting or clearing the check boxes next to the portlets.
- Click **Finish**.

The portlet group appears on the **Portlets** tab.

Control Access to Portlets

You can control access to portlets by setting access permissions to specify which portlets are available to which users and what kind of actions the users can perform on a specific portlet. You can set access permissions individually for each portlet, or at the group level.

To add a portlet to a page and access its content, end users need read, execute, and traverse permissions for the portlet.

You can restrict access to portlets temporarily by disabling (p. 226) them. This may be required when you want to update the portlet producer or modify the portlet settings. When users try to access a disabled portlet from their page, they see a message.

You can also lock the portlet if you do not want users to see the edit button in the portlet. As a result, users cannot see the portlet properties and cannot modify them (p. 397).

Steps to Set up Access Permissions

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Portlets**.
3. Decide whether to set access permissions at the group level, or for each portlet individually.
4. - To set permissions for a portlet group, click its properties button in the **Actions** column and, on the **Permissions** tab, specify the permissions as required.
5. - To set permissions for a specific portlet, click the associated portlet group and, for the portlet you want, click its properties button in the **Actions** column and specify the permissions as required.

   For more information, see "Access Permissions" (p. 191)
6. Click **OK**.

Steps to Lock a Portlet

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Portlets**.
3. Click the appropriate portlet group.
4. In the **Actions** column, click the lock icon associated withe the portlet you want to lock.

   Alternatively, click the **More** link, and then click **Lock portlet settings**.

   The icon changes to locked.

Configure the Portlet Cache

Portal Services can cache HTML markup fragments that are used to quickly regenerate recent views of the portlet pages. These markup fragments are compressed and stored on the server computer as part of the session object.

The basic cache unit represents markup fragments created per page, per one user session. The portlet markup is not always cached. Disabling markup caching saves memory usage, but has a negative impact on performance.

You can control the use of the cache by portlets at run-time by using the CPSMaxCacheSizePerPortlet parameter. You must provide run-time values for this parameter for every application server that runs the presentation service. The CPSMaxCacheSizePerPortlet parameter shows the number of markup fragments cached for each portlet, per page, per user. For example, a value of 5 with 1000 users, 10 pages, and 4 portlets per page can generate a maximum of 200000 entries in the cache (1000 x 10 x 4 x 5).

The values for the CPSMaxCacheSizePerPortlet parameter are

- -1 (default)

  This value saves unlimited number of portlet markups.

- 0

  This value disables markup caching.

- 1 or an integer greater than 1

  This value limits the number of markups to a specified number.

To enable or disable encryption of the portlet markup fragments, use the parameter **encryptTemporaryFiles** of the **Environment** category in Cognos Configuration. For more information, see the Cognos Configuration *User Guide*.

Steps

1. In Cognos Connection, click **Launch, Cognos Administration**.
2. On the **Configuration** tab, click **Dispatchers and Services**.
3. Click the dispatcher you want.
4. For **PresentationService**, in the **Actions** column, click the set properties button.
5. Click the **Settings** tab.
6. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
7. If it appears, select the **Override the settings acquired from the parent entry** check box. Otherwise, proceed to the next step.
8. In the **Parameter** column, type **CPSMaxCacheSizePerPortlet.**
9. In the **Value** column, type the required values for the CPSMaxCacheSizePerPortlet parameter.

10. Click **OK**.
11. Click **OK** again.
12. Click the **Configuration** link in the path at the top of the page.

    You return to the list of dispatchers.
13. If you have more than one dispatcher configured, perform steps 3 to 12 for each remaining dispatcher.
14. Restart the Cognos 8 service.

Modify a Portlet

You can define the default content and appearance of portlets. The settings become the default for all users who use the portlet. You can lock the portlet for editing if you want to prevent other users from changing the settings.

If the portlet is not locked for editing, users can change their instance of the portlet. They retain their custom settings even if you reset the portlet. Users inherit the settings you configure when they use the portlet instance you configured, or when they reset their portlet instance using the reset button in the portlet edit mode.

Applications that appear in the Cognos Extended Applications portlet may include editable application parameters with default values defined by the developer. To change the parameter values that users see as defaults, you must edit the applications.xml file. For information about modifying application parameters, see the *Developer Guide*.

The configurable properties for the Cognos portlets vary. For more information, see "User Reference Help for Portal Services" (p. 655).

Steps

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Portlets**.
3. Click the portlet group you want.
4. Next to the portlet you want to modify, click the **More** link.
5. Click **View and customize this portlet**.

   The Cognos portlet appears.
6. In the portlet toolbar, click the edit button .

   When you modify the Cognos Content portlets, you can use the configure button , which gives you access to additional functionality.

   The portlet properties page appears.

Tip: To exit the properties page without saving the changes, click the return button in the title bar or click **Cancel**.

7. Change the portlet properties as required.

   Tip: To restore the default settings, click the reset button .

8. Click **OK**, and click the portal return button .

   You return to the **Portlets** tab.

Display the HTML Code From the Source RSS Feed in RSS Viewer and Cognos Navigator

Some RSS channels contain HTML code sequences as part of their title and description fields. For security reasons, the HTML code, if present in the source RSS feed, is disabled in the news list view in the portlets RSS Viewer and Cognos Navigator. Instead, a series of HTML control characters is displayed in the title and description fields of both portlets.

You can override this setting and allow the HTML code to be executed in RSS Viewer and Cognos Navigator to display the code as intended by the publisher of the RSS feed. To do that, specify the CPSRssAllowUnsafeCharacters run-time parameter with a value of "true" for the dispatcher presentation service. The default value for this parameter is "false".

Warning: Allowing execution of the HTML code from external sources represents a security threat.

Steps

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Dispatchers and Services**.
3. Click the dispatcher you want.
4. For the **PresentationService**, in the **Actions** column, click the set properties button.
5. Click the **Settings** tab.
6. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
7. If it appears, select the **Override the settings acquired from the parent entry** check box.
8. In the **Parameter** column, type the parameter **CPSRssAllowUnsafeCharacters**
9. In the **Value** column, as a value for this parameter, type **true**
10. Click **OK**.
11. Click **OK** again.
12. Click the **Configuration** link in the path at the top of the page.

    You return to the list of dispatchers.

13. If you have more than one dispatcher configured, perform steps 3 to 12 for each remaining dispatcher.

Styles

A style is a defined set of resources, such as images and cascading style sheets, that controls the appearance of the Cognos 8 Web interface. The branding images and fonts are also part of the style.

The resources for the styles are located in the *c8_location*/webcontent/skins directory.

The following predefined styles are available in Cognos 8:

Style	Description
business	Uses soft colors. Creates clean and simple, professional look.
classic	Matches the style used by Metric Studio.
contemporary	Uses bolder, more vivid colors.
corporate	Matches the Cognos corporate branding. This is the default style in Cognos 8.
modern	Matches the style used by Cognos ReportNet.
presentation	A variation of the corporate style. Uses larger fonts and increased contrast. Intended for projections.

If the predefined styles do not meet your requirements, you can create your own style and make it available in Cognos 8 (p. 440).

At run time, individual users can choose any of the available styles to use in their Web interface (p. 231). Ensure that all users have access to at least one style.

The initial style settings for new users are determined by the default user profiles. For information about changing the user profiles, see "Managing User Profiles" (p. 309).

Managing styles involves:

- Adding new styles (p. 400)
- Controlling access to styles (p. 400)
- Modifying styles (p. 401)

Add a New Style

You add a new style to create the style object in Content Manager and to associate it with the style resources in the product directory.

Use this functionality to add a custom style or to create different styles based on the existing style resources. For example, you can add a new style named blue and associate it with the corporate style resources in the *c8_location*/webcontent/skins/corporate directory.

Before you can add a custom style, the style resources must exist in the *c8_location*/webcontent/skins directory. For more information about customizing styles, see "Customizing Styles" (p. 439).

Steps

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Styles**.

   The new style wizard appears.
3. Click the new style button .
4. Type a name for the style and, if you want, a screen tip and description.

   The style name can be any word or phrase you want. It does not need to match the name of the product directory where the style resources are located.

   Tip: You can specify the style name, description, and screen tip only in the product language you currently use. To specify these values for different languages, you can later modify the style (p. 401).
5. Click **Next**.
6. Specify the location of the style resources:
   - In the **Style location name** box, type the name of the style directory where the style resources are located.

     You can specify one of the predefined style directories, such as corporate, classic or modern, or a custom directory, if it exists.
   - In the **Preview image URL** box, type the URL address where the preview resource for the style is located.

     An example of a preview resource can be a Web server page, a video, or an image.
7. Click **Finish**.

Control Access to Styles

Users may need to use different styles in their Web interface depending on the company branding requirements, locale, or product implementation. For example, the styles for Asian users may have specific characteristics that do not apply to users in other geographical locations. Therefore, these styles can be hidden from non-Asian users.

You can control access to styles by setting access permissions on them. To make a style available to end users, you grant execute permissions for the required users, groups, or roles. No other permissions are needed. As a result, the style appears in the users' preferences in Cognos Connection (p. 231). Users can use the style, but they cannot modify it.

Read, write, or set policy permissions can be granted for administrator users. Traverse permissions are irrelevant in relation to styles.

For more information about security, see "Access Permissions" (p. 191).

Steps

1. In Cognos Connection, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Styles**.
3. Click the properties button for the style you want.
4. Click the **Permissions** tab.
5. Select the **Override the access permissions acquired from the parent entry** check box.
6. Grant the required type of access permissions.
   - For end users, grant execute permissions for the users, groups, or roles you want to have access to this style.
   - For administrators, grant read, write, or set policy permissions.

   For more information, see "Set Access Permissions for an Entry" (p. 194).

Modify a Style

You can modify an existing style to

- change the style name, description, and screen tip

  You can rename any of the predefined or custom styles to use style names that are more appropriate for your Web interface.

- add, change, or remove the style name, description, and screen tip for different language versions of the product

  You may want the style name, description, and screen tip match the users' product language.

- change the style directory

  You can associate an existing style with a different style directory in *c8_location*/webcontent/skins. You may need to do this when, for example, the names of the style directories change as a result of the product translation into different languages.

For more information about the style general properties, see "Entry Properties" (p. 217)

Steps

1. In Cognos Connection, click **Launch**, **Cognos Administration**.

2. On the **Configuration** tab, click **Styles**.
3. Click the properties button for the style you want.
4. On the **General** or **Styles** tab, modify the properties as required.
5. Click **OK**.

Chapter 27: Deploying Cognos Portlets to Third-party Portals

You can deploy Cognos portlets to your existing enterprise portal so that you can present the Cognos content in your portal instead of Cognos Connection.

You can deploy the Cognos portlets to the following portals:

- IBM WebSphere 5.0, 5.1, and 6.0(p. 403)
- SAP Enterprise Portal 6.0, 6.4 and 7.0(p. 407)
- Plumtree 5.0 and 5.5 (p. 411)
- Microsoft SharePoint Portal Server 2003 and 2007 (p. 416)

If you want to use the ReportNet 1.1 portlets in Cognos 8, you may need to upgrade them (p. 425).

By default, the root name of file paths in the portlets is Cognos. You can change the root name (p. 425).

As an additional security measure, you can disable the mechanism to transfer the Cognos 8 passport ID as a URL parameter between users' browsers and the Cognos 8 gateway (p. 426).

After you deploy the portlets, you can enable single signon between the portlets and your portal (p. 428).

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

Deploying Cognos Portlets to IBM WebSphere Portal 5.0, 5.1, and 6.0

Before users can add Cognos portlets to their portal pages, you must deploy the portlets to the portal server.

You can deploy the following portlets:

- Cognos Content portlets

  This group includes Cognos Navigator, Cognos Search, Cognos Viewer.

- Cognos Extended Applications portlets

This group includes the Cognos Extended Applications portlet.

- Metric Studio portlets

  This group includes the Metric List and Metric History Chart portlets.

Before you start deploying the portlets, ensure that Cognos 8, including Cognos Connection and Portal Services, is installed and configured.

For the Cognos Extended Applications portlet, Cognos 8 Software Development Kit must also be installed. If Cognos 8 Software Development Kit is not installed or not available, the portal administrator should disable the Cognos Extended Applications portlet after the portlet applications file is installed (p. 404).

For the Metric List and Metric History Chart portlets, Metric Studio must also be installed. If Metric Studio is not installed or not available, the portal administrator should disable the Metric List and Metric History Chart portlets after the portlet applications file is installed (p. 404).

You must first log on to the portal with administrator privileges.

The deployment process consists of the following tasks:

- Installing the portlet applications file
- Configuring the portlet applications
- Configuring the portlet cache
- Customizing the content of Cognos portlets

After you deploy the portlets, you can configure security for your WebSphere Portal environment (p. 428).

For more information, see the *Installation and Configuration Guide*.

Notes

Portal Services in Cognos 8 supports WebSphere Portal 5.0, 5.1, and 6.0. This document describes administrative tasks for version 5.1. The tasks may vary slightly for the versions 5.0 and 6.0.

Install the Portlet Applications File

Before Cognos content can appear in any WebSphere page, you must install the portlet applications file CognosBIPortlets_c83.war located in the *c8_location*\cps\ibm\portlets directory. This file contains the applications for the Cognos portlets, one for Cognos Navigator, Cognos Search, and Cognos Viewer, one for Cognos Extended Applications, and one for Metric List and Metric History Chart.

To install the portlet applications file, you must be logged on to the portal with administrator privileges, and be able to access the CognosBIPortlets_c83.war file from your file system or network file system. If the Portal Services installation is not within your network access, you must manually move the CognosBIPortlets_c83.war file to an accessible location.

The portlet applications file can be installed only once. However, it can be updated when required.

Steps

1. At the top of the portal page, click the **Administration** tab.
2. From the menu on the left, click **Portlet Management**, **Web Modules**, and then click **Install**.

   Tip: To update the CognosBIPortlets_c83.war file, click **Web Modules**, select the file name, and click the update web module button .
3. Click the **Browse** button, and, in the *c8_location*\cps\ibm\portlets directory, select the CognosBIPortlets_c83.war file.
4. Click **Next**.
5. Click **Finish**.

   A message confirms that the portlets were successfully installed.

Configure the Portlet Applications

Configure the portlet application to specify the signon mechanism and the address of the server component for Portal Services. This must be done for all sets of Cognos portlets: the Cognos Content portlets, the Cognos Extended Applications portlets, and the Metric Studio portlet.

Steps

1. On the **Administration** tab, click **Portlet Management**, **Web Modules**.
2. Click the CognosBIPortlets_c83.war file.

   A list of the Cognos portlet applications appears.
3. For the application you want, click the edit portlet application button .

   The edit page appears.
4. For the **Active Credential Type** property, enter one of the following values to specify the single signon mechanism used in your installation.
   - LtpaToken
   - HttpBasicAuth
   - SiteMinderToken
   - WebSealToken

   For more information about configuring single signon for Portal Services, see "Configuring Security for Portal Services" (p. 428).
5. For the **Cognos 8 WSRP WSDL Location** property, modify the URL as required to connect to the CPS server. The URL must contain the correct protocol, server name, port number, and server path.

By default, the protocol is http. If Cognos 8 is configured to be accessed through Secure Sockets Layer (SSL) connections, change the protocol to https.

The server path must point to a Cognos 8 gateway.

- For the Cognos Navigator, Cognos Search, and Cognos Viewer portlets, the path is *c8_gateway*/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl.
- For the Cognos Extended Applications portlet, the path is *c8_gateway*/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl.
- For the Metric Studio portlets, the path is *c8_gateway*/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl.

6. Click **OK**.

   The Cognos portlets are now available to be added to pages by users. You can configure Cognos portlets so that their default settings are the same for all users.

7. Repeat steps 3 to 6 for the Cognos Extended Applications Portlets and the Metric Studio Portlets.

   Note: You can create the Cognos Extended Applications portlets only if Cognos 8 Software Development Kit is installed. For information about creating extended applications for Portal Services, see the *Developer Guide*.

Configure the Portlet Cache

Portal Services caches HTML markup fragments that are used to quickly regenerate recent views of portlet pages. These markup fragments are compressed and stored in the user's session object. You can configure the number of pages stored for each user's portlet.

The size of the markup fragment for each page depends on the complexity of the portlet, but they are typically about 5KB. By default, the cache stores ten pages for each user's portlet.

Steps

1. On the **Administration** tab, click **Portlet Management**, **Web Modules**.
2. Click the portlet applications file CognosBIPortlets_c83.war.
3. In the portlet applications list, click the application you want.
4. For the portlet you want to set the cache size, click the configure portlet button .
5. For the **Maximum Cached Pages** property, enter the maximum number of pages you want to cache.
6. Click **OK**.
7. Repeat steps 4 to 6 for each portlet.
8. Restart the Cognos 8 service.

Customize the Content of Cognos Portlets

As an administrator, you can define the default content and appearance of portlets. When you customize a portlet instance using the configure button , the settings become the default for all users who view this instance.

If the portlet is not locked for editing, users can customize the content for their instance of the portlet. Users retain their custom settings even if you reset the portlet. Users inherit the settings you configure only when they view the instance you configured, or when they reset the portlet using the reset button in the edit page of the portlet.

Applications that appear in the Cognos Extended Applications portlet may include editable application parameters with default values defined by the developer. To change the parameter values that users see as defaults, you must edit the applications.xml file. For information about modifying application parameters, see the *Developer Guide*.

The configurable properties for the Cognos portlets vary. For more information, see "User Reference Help for Portal Services" (p. 655).

Steps

1. Go to the page where you added the Cognos portlets.
2. Click the configure button for the portlet that you want to configure.
3. Edit the settings as required.

   These become the default settings for user instances of this portlet.
4. Click **OK**.

Deploying Cognos Portlets to SAP Enterprise Portal 6.0. 6.4, and 7.0

Before users can add Cognos portlets to their portal pages, you must deploy the portlets to the portal server.

You can deploy the following portlets:

- Cognos Content portlets

  This group includes Cognos Navigator, Cognos Search, Cognos Viewer
- Cognos Extended Applications portlets

  This group includes the Cognos Extended Applications portlet.
- Metric Studio portlets

  This group includes the Metric List and Metric History Chart portlets.

Before you start deploying the Cognos portlets, ensure that Cognos 8, including Cognos Connection and Portal Services, is installed and configured.

For the Cognos Extended Applications portlet, Cognos 8 Software Development Kit must also be installed. If Cognos 8 Software Development Kit is not installed or not available, the portal administrator should disable the Cognos Extended Applications portlet after the Cognos business package is installed (p. 408).

For the Metric List and Metric History Chart portlets, Metric Studio must also be installed. If Metric Studio is not installed or not available, the portal administrator should disable the Metric List and Metric History Chart portlets after the Cognos business package is installed (p. 408).

In SAP Enterprise Portal, portlets are named iViews. Portions of this document refer to iViews as portlets.

You must first log on to the portal with administrator privileges.

The deployment process consists of the following tasks:

- Installing the Cognos business package
- Editing properties for the iViews
- Setting the default iViews content and appearance

After you deploy the portlets, you must configure security for your SAP Enterprise Portal environment.

Notes

Portal Services in Cognos 8 supports SAP portals 6.0, 6.4, and 7.0. This document describes administrative tasks for version 6.0. The tasks may vary slightly for the versions 6.4 and 7.0.

Install the Cognos Business Package

The Cognos business package is an Enterprise Portal Archive (.epa) file named com.cognos.pct.cognos83.epa. This package contains the Cognos Navigator, Cognos Search, Cognos Viewer, Cognos Extended Applications, Metric List, and Metric History Chart iViews, and the com.cognos.pct.cognos83.ivew.par file.

You must be logged on to the portal with administrator privileges and be able to access the com.cognos.cognos83.epa file from your file system or from the network file system. If the Cognos installation is not within your network access, you must manually move the com.cognos.cognos83.epa file to an accessible location.

Steps

1. In the portal, click the **System Administration** tab.
2. On the **Transport** tab, click **Import**.
3. Next to **Source for Package Files**, click **Client**.

   If **Client** is not functional, click **Server**.
4. Click **Browse** to locate the com.cognos.cognos83.epa file, and click **Open**.

   The com.cognos.cognos83.epa file is located in the *c8_location*\cps\sap\package directory.

If you clicked **Server** in the previous step, browse for the com.cognos.cognos83.epa file in the *SAP_installation*\usr\sap*env*\SYS\global\pcd\Import directory, where *env* represents a directory that is different for different environments. The com.cognos.cognos83.epa file must first be copied to this directory.

5. Click **Upload**.

Edit Properties for the iViews

The business package includes the Cognos iViews (p. 407). Edit the properties for each iView so that they work with your Cognos 8 installation.

The following table shows some of the properties you may want to modify.

Property	Description
CPS: Connection Server	Represents the URL required to connect to the Portal Services server. The URL must contain the correct protocol, server name, port number, and server path. By default, the protocol is http. If Cognos 8 is configured to be accessed through Secure Sockets Layer (SSL) connections, change the protocol to https. The server path must point to a Cognos 8 gateway. • For the Cognos Navigator, Cognos Search, and Cognos Viewer iView, the path is *c8_gateway*/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl • For the Cognos Extended Applications iView, the path is *c8_gateway*/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl • For the Cognos Metric List and Metric History Chart iView, the path is *c8_gateway*/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsd

Property	Description
CPS: Configuration Mode Role	Specifies the SAP role whose members, typically administrators, can modify the default iView properties (p. 410). These users can see the link **Edit the properties for all users** at the bottom of the iView properties page, and use it to modify the default iView properties. Only one SAP role can be specified to modify the default iView properties. Default: content_admin_role

Steps

1. Log on to the portal with administrator permissions.
2. Click the **Content Administration** tab.
3. In the window on the left, on the **Browse** tab, expand the **Portal Content** folder.
4. Continue expanding the folders until you see Cognos iViews.

   By default, Cognos iViews are imported into the Portal Content, Content Provided by Other Vendors, End User Content, com.cognos.pct.cognos8, iviews folder.
5. Double-click the iView you want to modify.

   The **Property Editor** appears in the main window.
6. In the **Property Category** drop-down list, click **Show All**.
7. Edit the properties as required.
8. Click **Save**.
9. Repeat steps 5 to 8 for each Cognos iView.
10. If you want to test the connection between Cognos 8 and Portal Services, click the **Preview** button.

Set the Default iView Content and Appearance for All Users

An administrator can define the default content and appearance for Cognos iViews. When end users add the iViews to their pages, the default properties are enabled. For example, in the Cognos Navigator iView, the administrator can define the default display folder or package. When users add this iView to their pages, they see the folder or package that was specified by the administrator.

End users can change the Cognos iView properties to personalize their pages. Their changes do not affect iViews of other users or other pages. The personalized settings are not affected if the

administrator changes the default properties for the iView. Users can click the **Reset** button to revert to the current administrative defaults.

To change the iView properties for all users, you must be a member of the SAP role that has the required access permissions. This role is specified by the **CPS: Configuration Mode Role** property. For more information, see "Edit Properties for the iViews" (p. 409).

Steps

1. Log on to the portal with administrator permissions.
2. Browse to the page that contains Cognos iViews.
3. For the iView you want to modify, click the option menu button in the upper-right corner of the iView, and select **Personalize**.

   The iView properties page appears.
4. At the bottom of the page, click the link **Edit the properties for all users**.
5. Change the properties as required.

   These settings become the default settings for user instances of this portlet.
6. Click **Save**.
7. Repeat steps 3 to 6 for other Cognos iViews.

Deploying Cognos Portlets to a Plumtree Portal 5.0 and 5.5

You deploy Cognos portlets to the portal server so that end users can add the portlets to their pages.

You can deploy the following portlets:

- Cognos Content portlets

  This group includes Cognos Navigator, Cognos Search, Cognos Viewer
- Cognos Extended Applications portlets

  This group includes the Cognos Extended Applications portlet.
- Metric Studio portlet

  This group includes the Metric List and Metric History Chart portlets.

Before you start deploying the Cognos portlets, ensure that Cognos 8, including Cognos Connection and Portal Services, is installed and configured.

For the Cognos Extended Applications portlet, Cognos 8 Software Development Kit must also be installed. If Cognos 8 Software Development Kit is not installed or not available, the portal administrator should disable the Cognos Extended Applications portlet after the Cognos portlet package file is imported (p. 414).

For the Metric List and Metric History Chart portlets, Metric Studio must also be installed. If Metric Studio is not installed or not available, the portal administrator should disable the Metric List and Metric History Chart portlets after the Cognos portlet package file is imported (p. 414).

You must first log on to the portal with administrator privileges.

The deployment process consists of the following tasks:

- starting the remote server
- importing the portlet package file
- connecting to the remote server
- customizing the content of Cognos portlets

After you deploy the portlets, you can configure security for your Plumtree Enterprise Portal environment (p. 428).

For more information, see the *Installation and Configuration Guide*.

Notes

Portal Services in Cognos 8 supports Plumtree Portal 5.0 and 5.5. This document describes administrative tasks for version 5.0. The tasks may vary slightly for version 5.5.

Start the Remote Server

The remote server is a Cognos Web application that serves as an interface between the core Cognos 8 components and the Plumtree portal. The remote server application is the cps-pt.war file installed with Cognos 8 in the *c8_location*\cps\plumtree\gadgets directory.

By default, after Cognos 8 is installed, the remote server is not started. It must be started if you want to use Cognos portlets in a Plumtree portal.

You can deploy the remote server to another server. Ensure that the settings are configured properly so that the remote server can access a Cognos 8 gateway.

You can start the remote server in its default configuration state. However, the default remote server works only if the following conditions are met:

- Cognos 8 is configured with a CGI gateway.
- The remote server runs on the same server as the Cognos 8 gateway, which can be accessed using http://localhost/cognos8.

If these conditions do not apply to your installation, you must change the configuration settings for the remote server before you start it.

To start the remote server, you must deploy the remote server into an active webapps folder:

- For Tomcat, copy the cps-pt.war file from the *c8_location*\cps\plumtree\gadgets directory into the *c8_location*\webapps folder.

  Tomcat automatically updates all affected directories and starts the remote server. The process may take a few minutes.

- For other application servers, follow the instructions in their administration guides.

You can now import the Cognos Portlet Package File (p. 414).

Reconfigure the Remote Server

If the default remote server configuration does not apply to your installation, or you want to change the configuration, you can change the configuration settings by modifying the cpspt.properties file. Then, you must rebuild the remote server (cps-pt.war), and start it by deploying it to an active webapps folder for your Web application server.

The following remote server parameters can be changed.

Parameter	Description
cps_endpoint	Specifies the URL to connect to the Cognos 8 server and extract the WSDL information. The default value of http://localhost/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/[package]?wsdl&b_action=xts.run specifies that the Cognos 8 gateway is configured on the same server as the remote server that it is running. In this situation, Cognos 8 can be accessed through a CGI gateway. If not, this parameter must be modified accordingly. Here are a few more examples of values for this parameter: • http://myserver/servletgateway/wsrp/cps4/portlets/[package]?wsdl&b_action=cps.wsdl Specifies a Cognos 8 servlet gateway installation on the server named myserver. • http://myserver/ISAPIgateway/wsrp/cps4/portlets/[package]?wsdl&b_action=cps.wsdl Specifies a Cognos 8 ISAPI gateway installation on the server named myserver.
forward_cookies	Specifies the names of cookies that must be forwarded to the Cognos 8 server for single signon purposes. If the single signon mechanism for the installation depends on a specific active credential cookie, it is necessary to pass this cookie from the Plumtree server to the Cognos 8 server. Default: null

Parameter	Description
cps_auth_secret	Specifies the value of the shared secret key. This parameter is optional. Use it only when your environment is configured to use the shared secret single signon mechanism. When this parameter is specified, the user's identity is sent to the Cognos 8 server through an HTTP header variable that is encrypted using the value of the shared secret. The value of this parameter must be identical to the one specified in Cognos Configuration. For more information, see "Configuring Security for Portal Services" (p. 428).
cps_auth_namespace	The namespace ID for the Custom Java Provider.

Steps

1. Stop your application server, such as Tomcat, or stop the remote server application.
2. Remove the existing remote server by doing one of the following:
   - For Tomcat, delete the cps-pt folder and the cps-pt.war file from the *c8_location*\webapps directory.
   - For other application servers, follow the instructions in their administration guides.
3. Open the cpspt.properties file.

   The file is located in the *c8_location*/cps/plumtree/webapps/gadgets/WEB-INF/classes directory.
4. Change the settings as required and save the file.
5. Rebuild the remote server by running the following batch file:
   - for Windows, *c8_location*\cps\plumtree\build.bat
   - for UNIX or Linux, *c8_location*\cps\plumtree\build.sh

   The configuration settings for the remote server (cps-pt.war) are changed.
6. Start the remote server (p. 412).

You can now import the Cognos portlet package file (p. 414).

Import the Cognos Portlet Package File

During the Cognos 8 installation, the Cognos portlet package file CognosPlumtree5PortletPackageC83.pte is installed as one of the Plumtree components. This file contains Web services, the remote server, and the definitions of the Cognos portlets (p. 411).

When you import the Cognos portlet package file, you create one instance of a Cognos portlet server, and one instance of each portlet. The Cognos portlet server acts as a binding layer for the

portlets. You can also supply your portal users with default portlets where the users can choose the content and layout.

Each portlet appears in a default state. The portlets do not contain any Cognos content, and the default access permissions are read and write for portal administrators, and read-only for portal users.

Steps

1. At the top of your portal page, click **Administration**.
2. Click **Portal Resources**.
3. Click **Create Object**, and click **Administrative Folder**.
4. Type a name, such as Cognos Portlets, and, if you want, a description for the group of Cognos portlets you want to import.
5. Click **OK**.
6. Click the folder you created.
7. Click **Select Utility** and click **Portal Resources - Import**.
8. Under **Folder Information**, click **Browse**.
9. Select the folder you created to store the new resources, and click **OK**.
10. Under **General Info**, click **Browse** to locate the CognosPlumtree5PortletPackageC83.pte file.

    This file is located in the *c8_location*/cps/plumtree/gadgets directory.
11. Click **Open**, and then click **Upload**.
12. Click **Finish**, and click **OK**.

The Cognos portlets appear in the Portal Services folder. You can now connect to the remote server (p. 415).

Connect to the Remote Server

The remote server must be configured and started (p. 412) before you can connect to it.

Steps

1. Click the folder that contains the Cognos portlets.
2. Expand the **Remote Server** folder, and click **Cognos Portal Services**.
3. In the **Edit Remote Server**page, in the **Remote Server Properties** box, change the **Base URL** from http://localhost:9300/ to the following, where *gadget server* is the name or IP address of the server that hosts the Cognos 8 remote server, and *port* is the port number used by the remote server.**http://gadget_server:port**

   The default port number is 9300.

Here is an example: http://myserver:9300/

4. Click **Finish**.

Customize the Content of Cognos Portlets

You can define the default content and appearance of portlets. When you customize a portlet instance, the settings become the default for all users who view this instance.

If the portlet is not locked for editing, users can customize the content for their instance of the portlet. Users retain their custom settings even if you reset the portlet. Users inherit the settings you configure only when they view the instance you configured, or when they reset the portlet using the reset button in the edit page of the portlet.

Applications that appear in the Cognos Extended Applications portlet may include editable application parameters with default values defined by the developer. To change the parameter values that users see as defaults, you must edit the applications.xml file. For information about changing application parameters, see the *Developer Guide*.

The configurable properties for the Cognos portlets vary. For more information, see "User Reference Help for Portal Services" (p. 655).

Steps

1. Go to the page where you added the Cognos portlets.
2. Click the configure button for the portlet you want to configure.
3. Edit the settings as required.

   These become the default settings for user instances of this portlet.
4. Click **Done**.

Deploying Cognos Portlets to Microsoft SharePoint Portal Server 2003 and 2007

You deploy Cognos portlets to the portal server so that users can add the portlets to their pages.

In SharePoint Portal Server, portlets are named Web Parts. Portions of this document refer to Web Parts as portlets.

You can deploy the following portlets:

- Cognos Content portlets

  This group includes Cognos Navigator, Cognos Search, Cognos Viewer
- Cognos Extended Applications portlets

  This group includes the Cognos Extended Applications portlet.

  To deploy this portlet, Cognos 8 Software Development Kit must also be installed.

- Metric Studio portlets

  This group includes the Metric List and Metric History Chart portlets.

  To deploy this portlet, Cognos 8 Metric Studio must also be installed.

Prerequisites

Before deploying the Cognos portlets, ensure that Cognos 8, including Cognos Connection and Portal Services, is installed and configured. Also ensure that the following conditions are met:

- You have administration access to the IIS server computer that hosts SharePoint.
- You have administration access to the Cognos 8 installation directory *c8_location*/cps/sharepoint.
- WSS Language Template Pack required for other supported languages is installed, one for each language.
- You know about any operating system or SharePoint-related updates as recommended by Microsoft Windows Updates.
- The required OS patches are installed.

  For SharePoint Portal Server 2003, they include:

  - Windows Server 2003 R2, professional or enterprise edition
  - Windows SharePoint Services (WSS) SP2
  - SharePoint Portal Server SP2

  For SharePoint Portal Server 2007, contact Microsoft for information about required OS patches.

To deploy Cognos portlets to a SharePoint Portal Server, perform the following tasks:

- ❑ Copy the Cognos Web Parts resources to the IIS HTTP root directory (p. 417)
- ❑ Set up the Cognos security trust file (p. 418)
- ❑ Modify the .NET Framework web.config file (p. 419)
- ❑ Modify the Cognos Web Parts catalog files (p. 422)
- ❑ Restart IIS (p. 422)
- ❑ Add Cognos Web Parts to a SharePoint page (p. 423)
- ❑ Customize the content of Cognos Web Parts (p. 424)

After you deploy the portlets, you can configure security for your SharePoint Portal Server environment (p. 428). For more information, see the *Installation and Configuration Guide*.

Copy the Cognos Web Parts Resources to the IIS HTTP Root Directory

Cognos provides the resources required for the integration of SharePoint Portal Server with Cognos 8. These include the Web Part DLLs for different languages, and catalog files for each Cognos Web

Part. You must copy these resources to the IIS HTTP root directory to make them available to SharePoint.

Steps

1. Go to the *c8-location*/cps/sharepoint directory.
2. Copy all files from this directory to the IIS HTTP root directory, as specified in the following table.

   An example of the IIS HTTP root directory can be C:/Inetpub/wwwroot for SharePoint Portal Server 2003, and C:/Inetpub/wwwroot/wss/VirtualDirectories/80 for SharePoint Portal Server 2007.

File	Cognos 8 Directory	IIS HTTP Root Directory
Cognos.BI.WebPart.dll	/bin	/bin
Cognos.BI.WebPart.resources.dll	/bin/de	/bin/de
Cognos.BI.WebPart.resources.dll	/bin/en	/bin/en
Cognos.BI.WebPart.resources.dll	/bin/fr	/bin/fr
Cognos.BI.WebPart.resources.dll	/bin/ja	/bin/ja
CognosNavigator.dwp CognosSearch.dwp CognosViewer.dwp CognosSDK.dwp CognosWatchList.dwp CognosHistoryChart.dwp	/wpcatalog	/wpcatalog
dialog_error.gif	/wpresources/Cognos.BI.WebPart	/wpresources/Cognos.BI.WebPart

Later you can edit the Cognos*.dwp catalog files (p. 422).

Set Up the Cognos Security Trust File

The Cognos Web Parts use the .NET Web Services Stack and they require a higher security trust level than the default minimum security. Cognos provides a sample of a security trust file named wss_cognostrust.config.sample. This file specifies the required security trust, named WSS_Cognos, for the Cognos Web Parts.

Use the wss_cognostrust.config.sample file provided for your version of SharePoint to set up the security trust for the Cognos Web Parts. For a simple SharePoint Portal Server installation the file can be used without any changes. For more complex installations, you may need to edit this file.

Note: If you already have a trust file used by other Web Parts in your SharePoint Portal Server, you can add the Cognos-specific information from the sample to the existing file so that it can also be used by the Cognos Web Parts.

Steps

1. Go to the *c8_location*/cps/sharepoint/config directory.
2. Copy the wss_cognostrust.config.sample file:
   - If you use SharePoint Portal Server 2003, copy the wss_cognostrust.config.sample file from the *c8_location*/cps/sharepoint/config/wss.2003 directory to the C:/Program Files/Common Files/Microsoft Shared/web server extensions/60/CONFIG directory.
   - If you use SharePoint Portal Server 2007, copy the wss_cognostrust.config.sample file from the *c8_location*/cps/sharepoint/config/wss.2007 directory to the C:/Program Files/Common Files/Microsoft Shared/web server extensions/12/CONFIG directory.
3. Rename the copied file to wss_cognostrust.config.

Modify the .NET Framework web.config File

Microsoft .NET Framework provides a configuration file named web.config. This file, located in the IIS HTTP root directory, is used to configure the SharePoint services at the application level. To configure the Cognos Web Parts, you must add the Cognos-specific configuration information to this file.

Cognos 8 provides a sample configuration file named web.config.sample that shows a typical, fully functional configuration of the Cognos Web Parts with a SharePoint portal. You can use this sample when editing the web.config file. However, do not copy this file directly to your IIS environment.

To configure the Cognos Web Parts with your SharePoint Portal Server, edit the web.config file by adding the Cognos configuration information (p. 419).

Steps

1. Go to the IIS HTTP root directory, for example, C:/ Inetpub/wwwroot for SharePoint 2003, and C:/Inetpub/wwwroot/wss/VirtualDirectories/80 for SharePoint 2007.
2. Open the web.config file in an XML editor, such as XML Spy.
3. Edit the web.config file as required (p. 419), and save the file.

Changes in the web.config File

The web.config file is the central configuration point for all .NET Framework applications.

Add the following information to the `configuration` element in this file.

Add the Cognos Configuration Section

In the `configSections` section, add the following `sectionGroup` element:

```
<sectionGroup name="Cognos">
  <section name="Log" type="System.Configuration.SingleTagSectionHandler,
System,Version=1.0.5000.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089"/>
  <section name="SoapLog" type="System.Configuration.
SingleTagSectionHandler,System,
Version=1.0.5000.0, Culffture=neutral, PublicKeyToken=b77a5c561934e089"/>
  <section name="SSO" type="System.Configuration.SingleTagSectionHandler,
System,Version=1.0.5000.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089"
/>
  <section name="PortalContext" type="System.Configuration.
SingleTagSectionHandler,
System, Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b77a5c561934e089"
/>
  <section name="Fault" type="System.Configuration.SingleTagSectionHandler,
System,
Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b77a5c561934e089"
/>
</sectionGroup>
```

Register the Cognos Web Part Assembly as a Safe Control

In the `SharePoint` section, add the following `SafeControl` element to the `SafeControls` element.

```
<SafeControl Assembly="Cognos.BI.WebPart, Version=1.0.0.0,
Culture=neutral, PublicKeyToken=cb3c72729d0875cd" Namespace="Cognos.Portal.
Services"
TypeName="*"
Safe="True"/>
```

Register the Cognos Security Trust File

Cognos Web Parts require the security trust named WSS_Cognos that is defined in the wss_cognostrust.config file (p. 418).

In the `system.web` section, add the following `trustLevel` element to the `securityPolicy` element.

- SharePoint Portal Server 2003

  ```
  <trustLevel
  name="WSS_Cognos" policyFile="C:\Program Files\Common Files\Microsoft
  Shared\Web Server Extensions\60\config\wss_cognostrust.config" />
  ```

- SharePoint Portal Server 2007

  ```
  <trustLevel name="WSS_Cognos"
  policyFile="C:\Program Files\Common Files\Microsoft Shared\Web Server
  Extensions\12\config\wss_cognostrust.config"
  />
  ```

Change the Trust Level to WSS_Cognos

WSS_Cognos is the security trust required by the Cognos Web Parts (p. 418).

In the `system.web` section, change the trust level from

```
<trust level="WSS_Minimal"
originUrl="" />
```

to

```
<trust level="WSS_Cognos"
originUrl="" />
```

Enable the Session Object

- In the `system.web` section, add the following element to the `httpModules` element if the element does not already exist:

  ```
  <add name="Session"
  type="System.Web.SessionState.SessionStateModule"/>
  ```

  If the element is commented out, remove the comments.

- In the `system.web` section, add the following `pages` element.

  ```
  <pages enableSessionState="true" enableViewState="true"
  enableViewStateMac="true"
  validateRequest="false" />
  ```

  If this element already exists, change the value of its `enableSessionState` attribute to `true`.

Register Cognos Portal Services as a SOAP Extension

In the `system.web` section, add the following `webServices` element:

```
<webServices>
  <soapExtensionTypes>
   <add type="Cognos.Portal.Services.SoapPatchExtension, Cognos.BI.WebPart,
Version=1.0.0.0, Culture=neutral, PublicKeyToken=cb3c72729d0875cd"
priority="1" group="0" />
  </soapExtensionTypes>
</webServices>
```

The `soapExtensionTypes` element represents all SOAP extensions that are available to your Web service at run time. If the `webServices` and `soapExtensionTypes` elements are already defined, add only the `add` element.

Specify the Cognos Configuration Parameters

Use the `Cognos` element to specify the Cognos configuration parameters as defined in Cognos Configuration.

Insert the following `Cognos` element between the closing tags `</system.web>` and `</configuration>`:

```
<Cognos>
 <SoapLog filename="c:\Cognos.BI.WebPart.Soap.log"
 <Log filename="c:\Cognos.BI.WebPart.log" error="true" warn="false" info="false"
debug="false" performance="false" />
 <SSO cps_auth_namespace="blank or as defined in
Cognos Configuration"
  cps_auth_secret="blank or as defined in Cognos Configuration"
/>
 <PortalContext gatewayURL="blank or as defined
in Cognos Configuration"
  webContentURL="blank or as defined in Cognos Configuration"
/>
 <Fault stacktrace="false" />
</Cognos>
```

The elements in the `Cognos` element represent the different configuration settings.

- Use the `SoapLog` element to specify the location for the Web Services log files.

- Use the `Log` element to specify a different location for the log file, and to enable the different logging features by changing the attribute values from `false` to `true`.
- Use the `SSO` element to specify the Cognos Security Namespace ID of the CPS trusted namespace named `cps_auth_namespace`, and the shared secret password named `cps_auth_secret`.

  This parameter is optional.
- Use the `PortalContext` element to specify the URL attributes for Cognos gateway and Cognos Web content, as shown in the following example:
  - gatewayURL="http://*c8_host_computer*/cognos8/cgi-bin/cognosisapi.dll"
  - webContentURL="http://*c8_host_computer*/cognos8"

  This parameter is optional.
- Use the `Fault` element to display the call stacks in the error page when a fault is caught by a Web Part.

Edit the Cognos Web Parts Catalog Files

The catalog files contain the definitions of the Cognos Web Parts to use in SharePoint Portal Server.

For each Cognos Web Part catalog file, change the WSDL URL to point to your Cognos 8 gateway.

Steps

1. Go to the IIS directory where the catalog files were copied.

   For example, for SharePoint Portal Server 2003, go to C:/Inetpub/wwwroot, and for SharePoint Portal Server 2007 go to C:/Inetpub/wwwroot/wss/VirtualDirectories/80.
2. In each Cognos Web Part catalog file, Cognos*.dwp, change the URL in the `WSDL` element to point to your Cognos 8 gateway.

   Here is an example:

   ```
   <WSDL xmlns="http://developer.cognos.com/webpart/v1">
   http://localhost/cognos8/cgi-bin/cognosisapi.dll/wsrp/cps4/portlets/
   nav?b_action=cps.wsdl&amp;wsdl</WSDL>
   ```

   Tip: The ampersand characters (&) in the URL must be XML-encoded as `&`
3. Save the file.

Restart IIS

You must restart Internet Information Services (IIS) for the configuration changes to take effect.

Step

- Restart IIS using its management console, or the iisreset.exe command line tool.

The Cognos Web Parts are now available in SharePoint Portal Server, and can be added to the portal pages (p. 423).

Add Cognos Web Parts to a SharePoint Page

You can use the Cognos Web Parts to add the Cognos content to your pages in SharePoint Portal Server.

You can add or remove the Web Parts from the shared view, or from the personal view of the page. Ensure that you are in edit mode before you make changes to the page.

The following steps provide only basic instructions for adding the Cognos Web Parts to SharePoint pages. For more information, see the SharePoint Portal Server help.

Steps for SharePoint Portal Server 2003

1. Log on to your SharePoint Portal Server with administrative permissions.
2. Go to the page where you want to add the Cognos Web Parts.
3. From the **Actions** list on the left side, click **Edit Page**.
4. In the upper-right corner of the page, click **Modify Shared Page**, **Add Web Parts**.
5. Click **Browse** to add a Web Part from an existing Cognos Web Part library.

   The page opens in design mode, and the **Add Web Parts** pane appears on the right side of the page.

   Tips:

   - You can use the **Search** option to find the Web Parts in the Web Part library.
   - You can use the **Import** option if the Web Part you want is not in the library.

     Type the path or browse to the location of the Cognos*.dwp file that you want to import, and then click **Upload**.
6. In the **Add Web Parts** pane, click **Virtual Server Gallery**.

   The Cognos Web Parts appear in the **Web Part List**.
7. Click the Cognos Web Part you want, and then click the **Add** button at the bottom of the pane.

   The Web Part appears at the top of the page.

   Tip: You can also drag the Web Parts to different drop zones in the page.
8. In the Web Part, click the down arrow in the upper-right corner, and click **Modify Shared Web Part**.
9. In the pane on the right side of the page, specify the URL of the WSDL file under **Connection Settings**, **WSDL**.

   The URL must point to a functional Cognos 8 installation.
10. Click **Discover Portlets**.
11. Specify the **Portlet handle** property.
12. Click **Apply** to make changes without closing the pane, or click **OK** when you are done.

13. Repeat steps 4 to 12 for each Cognos Web Part you want to add to the page.

You can now customize the content of the Cognos Web Parts (p. 424).

Steps for SharePoint Portal Server 2007

1. Log on to your SharePoint Portal Server with administrative permissions.
2. Go to the page where you want to add the Cognos Web Parts.
3. From the **Site Actions** menu in the upper-right corner, click **Edit Page**.
4. In the Web Part zone where you want to add the Cognos Web Part, click **Add a Web Part**.
5. In the **Add Web Parts** dialog box, click **Advanced Web Part gallery and options** at the bottom.
6. In the **Add Web Parts** tool pane on the right side of the page, click **Server Gallery**.
7. From the list of available Cognos Web Parts, click the Web Part you want.
8. At the bottom of the tool pane, from the **Add to** menu, select the location on the page where you want the Web Part to appear, and click the **Add** button.

   Tip: You can also drag the Web Part to different drop zones in the page.
9. Repeat steps 4 to 8 for each Cognos Web Part you want to add to the page.
10. Click **Exit Edit Mode**.

You can now customize the content of the Cognos Web Parts (p. 424).

Customize the Content of Cognos Web Parts

An administrator can define the default content and appearance for Cognos Web Parts. When users add the Web Part to their pages, the default properties are enabled. For example, in the Cognos Navigator Web Part, the administrator can define the default display folder or package. When users add this Web Part to their pages, they see the folder or package that was specified by the administrator.

Users can change the Cognos Web Part properties to personalize their pages. The changes made by each individual user do not affect other users or other pages. The personalized settings are not affected if the administrator changes the default properties for the Web Part. Users can click the **Reset** button to revert to the current administrative defaults.

The configurable properties for each Cognos Web Part are different. For more information, see "User Reference Help for Portal Services" (p. 655).

Steps for SharePoint Portal Server 2003

1. Go to the page in your SharePoint Portal Server that contains the Cognos Web Part you want to edit.
2. From the list of **Actions** on the left side, click **Edit Page**.
3. In the Web Part, click the down arrow in the upper-right corner, and click **Edit Preferences**.

The Web Part properties page appears.

4. Specify the settings as required.

   For more information, click the help button in the upper-right corner of the properties page.

5. Click **OK**.

Steps for SharePoint Portal Server 2007

1. Go to the page in your SharePoint Portal Server that contains the Cognos Web Part you want to edit.
2. From the **Site Actions** menu in the upper-right corner, click **Edit Page**.
3. In the Web Part that you want to change, click the **edit** button.
4. Click **Edit preferences**.

   The Web Part properties page appears.

5. Specify the settings as required.

   For more information, click the help button in the upper-right corner of the properties page.

6. Click **OK**.

Migrating Cognos Portlets from Cognos ReportNet 1.1 to Cognos 8

When you upgrade ReportNet 1.1 to Cognos 8, you must update the portlets using the latest portlet package file installed with Cognos 8.

For a WebSphere portal, use the CognosBIPortlets_c83.war file located in the *c8_location*\cps\ibm\portlets directory (p. 403).

For SAP Enterprise Portal 6.0, use the com.cognos.cognos83.epa file located in the c8_location\cps\sap\package directory (p. 407).

Importing the new package into the portal creates a new and distinct set of Cognos portlets and resources. The upgraded portlets are not compatible with ReportNet 1.1, and the personalized settings are lost. You must configure and test the new portlets as required for Cognos 8.

Change the Root Name of File Paths in Cognos Portlets

By default, the root name shown for all file paths in Cognos portlets is Cognos. You can change the root name to another name, such as your company name, by modifying the cpsinavcrnmsgs_custom.properties file in the *c8_location*/webapps/p2pd/WEB-INF/classes directory. This changes the root name for the currently used content locale.

If you want to specify root names for different locales, you must create new properties files for the required locales in the *c8_location*/webapps/p2pd/WEB-INF/classes directory. For example, to specify root names for English, French, German, and Japanese locales, create the following properties files, and provide the root name value in each of them:

- cpsinavcrnmsgs_custom_en.properties
- cpsinavcrnmsgs_custom_fr.properties
- cpsinavcrnmsgs_custom_de.properties
- cpsinavcrnmsgs_custom_ja.properties

Steps

1. Open the cpsinavcrnmsgs_custom.properties file in a text editor that supports UTF-8 encoding format.

   The file is located in the *c8_location*/webapps/p2pd/WEB-INF/classes directory.

2. Change the value 0f the property `nav.root.name` as follows, where `root_name` represents the value you change:
   `nav.root.name=root_name`

   The default is:
   `nav.root.name=Cognos`

3. Save the cpsinavcrnmsgs_custom.properties file.
4. If you want to specify root names for different locales, create the required properties files now.
5. Restart the Cognos 8 server.

Disable the Transfer of the Cognos 8 Passport ID as a URL Parameter

To ensure a higher degree of security, you can disable the mechanism that transfers the Cognos 8 passport ID as a URL parameter between users' browsers and the Cognos 8 gateway. You can do this only when single signon is implemented between the users' browsers and Cognos 8, and, if applicable, Cognos Series 7, independently of Portal Services.

By default, Portal Services re-creates the active credential cookie in the user's browser by passing the passport ID as a URL parameter. If single signon is not implemented, then when portal users interact with Cognos portlets, they are authenticated both in the portal and in Cognos 8. The portal, not the user's browser, maintains the active credential token generated by Cognos 8. In some situations, for example when you want to see a report in a Cognos portlet, a direct connection between the user's browser and the Cognos 8 gateway must be established. This may become a

security risk because a valid Cognos 8 passport ID appears in some log files. The same applies when Cognos 8 is integrated with Cognos Series 7 and the active credential is passed as a URL parameter.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Configuration** tab, click **Dispatchers and Services**.
3. Click the dispatcher you want.
4. For the **PresentationService**, in the **Actions** column, click the set properties button.
5. Click the **Settings** tab.
6. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
7. Select the **Override the settings acquired from the parent entry** check box.
8. In the **Parameter** column, type the parameter names:
   - **CPSPropagatePassport**

     This parameter controls the transfer of the Cognos 8 passport ID as a URL parameter. When set to 0, it stops the transfer.
   - **CPSPropagateTicket**

     Controls the transfer of the Cognos Series 7 ticket ID as a URL parameter. When set to 0, it stops the transfer.

   The parameters are case sensitive.
9. In the **Value** column, type 0 for each parameter.
10. Click **OK**.
11. Click **OK** again.
12. Click the **Configuration** link next to the path at the top of the page.

    You return to the list of dispatchers.
13. If you have more than one dispatcher configured, perform steps 3 to 12 for each remaining dispatcher.

Set Portal Services Protocol Scheme

For WebSphere portals, if you are using multiple gateways that may not use the same HTTP or HTTPS protocol as specified for the default gateway, you can set the CSPProtocolScheme parameter to override all other protocol settings.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.

2. On the **Configuration** tab, click **Dispatchers and Services**.
3. Click the dispatcher you want.
4. For **PresentationService**, in the **Actions** column, click the set properties button.
5. Click the **Settings** tab.
6. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
7. If it appears, select the **Override the settings acquired from the parent entry** check box. Otherwise, proceed to the next step.
8. In the **Parameter column**, type **CPSProtocolScheme**.
9. In the **Value column**, type **http** or **https**.
10. Click **OK** twice.
11. Click the **Configuration** link in the path at the top of the page.

    You return to the list of dispatchers.
12. If you have more than one dispatcher configured, perform steps 3 to 11 for each remaining dispatcher.

Configuring Security for Portal Services

When using Portal Services in a third-party portal, you must enable single signon to provide seamless integration between the third-party portal and Cognos 8 components.

Portal Services uses single signon to authenticate users. This means that users do not have to log on to other applications separately through the portal.

You must configure a URI into Cognos 8 components for each portlet in Portal Services.

To enable security between Cognos 8 components and the third-party portal, do the following:

- Disable anonymous access to Cognos 8 components.

  If your security infrastructure requires you to use another method for single signon, use one of the following methods:

- Enable single signon for the third-party portal using shared secret.

  If your security infrastructure requires you to use another method for single signon, use one of the following methods:

  - "Enable Single Signon for WebSphere Portal Using the Application Server" (p. 437)
  - "Enable Single Signon for Plumtree Portal Using Basic Authentication" (p. 437)
  - "Enable Single Signon for Plumtree Portal Using SiteMinder" (p. 438)

- Configure Cognos 8 components for SSL access, if required.

  For instructions, see the *Installation and Configuration Guide*.

Disable Anonymous Access to Cognos 8 Components

Portal Services uses single signon for authentication. If anonymous logon is enabled in Cognos 8 components, Portal Services logs all portal users as anonymous. You must ensure that anonymous access is disabled in Cognos 8 components for single signon in Portal Services to be successful. However, you can test the Portal Services connections using anonymous logon to ensure that the portlets are working in the third-party portal.

If Portal Services fails to authenticate a user, the user receives an error message at the third-party portal.

Steps

1. Start Cognos Configuration.
2. In the **Explorer** window, under **Security**, **Authentication**, click **Cognos**.
3. In the **Properties** window, ensure that **Allow anonymous access** is set to **False**.
4. From the **File** menu, click **Save**.
5. Repeat steps 1 to 4 on all servers where you installed Cognos 8 components.

Enable Single Signon Using Shared Secret

You can use shared secret for single signon between Cognos portlets and Cognos 8 components. The Cognos portlets send a message that contains an encrypted version of the portal user ID. The encryption key is determined by the value of a secret character string shared between the portlets and the custom Java security provider on the Cognos server.

You can use shared secret for the third-party portal only if portal user IDs can be looked up in an NTLM, LDAP, or Cognos Series 7 authentication namespace that is shared by Cognos 8 components.

Cognos 8 components must have access to a directory server that contains user IDs for all your portal users. Using Cognos Configuration, you must configure an authentication namespace so that the portal and Cognos 8 components share the same authentication source.

You must also create a Custom Java Provider namespace to register the shared secret Java provider that is provided with Cognos 8 components. Within the portlets or iViews, you must link the portlets or iViews to the Custom Java Provider namespace within your respective portal:

- Cognos iViews (SAP EP)
- Cognos Portlet Application (WebSphere Portal)
- remote server (Plumtree Portal)
- Cognos WebPart (SharePoint Portal)

You are not required to configure access to the Portal Services Web content. However, if you deploy the portlets to a third-party portal, you can configure access to an alternate URI for Portal Services images and Web content.

Steps to Configure the Required Namespaces

1. In Cognos Configuration, configure a namespace to authenticate portal users.

   For instructions, see the topic about configuring LDAP, NTLM, or Cognos Series 7 authentication providers in the *Installation and Configuration Guide*.

2. For an LDAP namespace, configure the following properties:

   - For the **Use external identity** property, change the setting to **True**.
   - For the **External identity mapping** property, set it to

     (uid=${environment("REMOTE_USER")})

   Other properties may be required. For more information, see the topic about configuring Cognos 8 components to use LDAP in the *Installation and Configuration Guide*.

3. For a Cognos Series 7 namespace, map the portal user IDs to Cognos Series 7 user IDs using OS signons.

   For more information, see the Cognos Series 7 documentation.

4. In Cognos Configuration, create and configure a Custom Java Provider namespace.

   For instructions, see the topic about configuring a custom authentication namespace in the *Installation and Configuration Guide*.

   - For the **Namespace ID** property, specify any new ID.

     For example, **cpstrusted**

     This new ID must be used in the portlet configuration settings.

   - For the **Java class name** property, type

     com.cognos.cps.auth.CPSTrustedSignon

     Java class names are case-sensitive.

5. In Cognos Configuration, under **Environment**, **Portal Services**, configure the following properties:

   - For **Trusted Signon Namespace ID**, type the namespace ID of the LDAP, NTLM, or Cognos Series 7 namespace that you configured in step 1.

     Tip: The trusted signon namespace acts as an intermediary and must be attached to a real directory-based namespace of type LDAP, NTLM, or Cognos Series 7.

   - For **Shared Secret**, type the key to be used for single signon.

     This parameter represents the authorization secret that must be shared between the Cognos portlets and the Cognos server. Consider this as a secret password. You must use the same character string when you configure the portlet application. You must use a single word as the key.

For security reasons, we recommend you specify a non-null value.

6. Under **Environment**, for **Gateway Settings**, set the **Allow Namespace Override** property to **true**.
7. From the **File** menu, click **Save**.
8. Restart the Cognos 8 service.

Steps to Configure Access to the Portal Services Web Content

1. On the computer where you installed the Application Tier Components, start Cognos Configuration.
2. In the **Explorer** window, under **Environment**, click **Portal Services**.
3. In the **Properties** window, click the **Value** box next to **Web Content URI**.
4. Specify the host name or IP address of the gateway and a port number using the format

   host_or_IP_address:port
5. From the **File** menu, click **Save**.

Steps to Configure the Cognos iViews for SAP EP

1. Open the iView editor for each Cognos iView.
2. In the **Property Category** box, select **Show All**.
3. For the **cpsauthsecret: CPS Authorization Secret** property, enter the secret character string that you used for the Shared Secret property when you configured the Custom Java Provider namespace.
4. For the **cps: authentication namespace ID** property, enter the Custom Java Provider namespace ID.
5. For the **cpsserver: CPS Connection Server** property, enter the URL path to access Portal Services components through the gateway.

   The format of the URL is as follows:

   - For Cognos content portlets

     ***Gateway_URI*/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl**

     Example for a CGI gateway:

     http://*myserver*/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl

     Example for a servlet gateway:

     http://172.0.16.1:9500/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl
   - For Cognos Extended Applications

     ***Gateway_URI*/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl**

Example for a CGI gateway:

http://*myserver*/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl

Example for a servlet gateway:

http://172.0.16.1:9500/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl

- For Metrics Manager Watchlist portlets

  ***Gateway_URI*/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl**

  Example for a CGI gateway:

  http://*myserver*/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl

  Example for a servlet gateway:

  http://172.0.16.1:9500/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl

Steps to Configure the Cognos Portlets for WebSphere Portal

1. For each Cognos portlet application, click **Modify Parameters**.
2. For the **cps_auth_secret** property, enter the secret character string that you used for the **Shared Secret** property when you configured the Custom Java Provider namespace.
3. For the **cps_auth_namespace** property, enter the Custom Java Provider namespace ID.
4. For the **CPS Endpoint** property, enter the URL path to access Portal Services components through the gateway.

   The format of the URL is as follows:

   - For Cognos content portlets

     ***Gateway_URI*/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl**

     Example for a CGI gateway:

     http://*myserver*/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl

     Example for a servlet gateway:

     http://172.0.16.1:9500/wsrp/cps4/portlets/nav?wsdl&b_action=cps.wsdl

   - For Cognos Extended Applications

     ***Gateway_URI*/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl**

     Example for a CGI gateway:

     http://*myserver*/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl

     Example for a servlet gateway:

     http://172.0.16.1:9500/wsrp/cps4/portlets/sdk?wsdl&b_action=cps.wsdl

- For Metrics Manager Watchlist portlets

  Gateway_URI/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl

  Example for a CGI gateway:

  http://*myserver*/cognos8/cgi-bin/cognos.cgi/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl

  Example for a servlet gateway:

  http://172.0.16.1:9500/wsrp/cps4/portlets/cmm?wsdl&b_action=cps.wsdl

Steps to Configure the Remote Server for Plumtree Portal

1. Using a plain ASCII editor, such as Notepad, edit the cpspt.properties file in the *c8_location*/cps/plumtree/webapps/gadgets/WEB-INF/classes directory.
2. Configure the following settings.

Parameter	Value
cps_endpoint	The URL to connect to the report server and extract the WSDL information. Specify the URI to the gateway. For a servlet or ISAPI gateway, replace the localhost/cognos8/cgi-bin/cognos.cgi portion with the values to target the gateway. For example, **http://host_name/cognos8/cgi-bin/cognos.isapi/wsrp/cps4/portlets/[package]?wsdl&b_action=cps.wsdl** For instructions, see the topic about changing the gateway in the *Installation and Configuration Guide*.
forward_cookies=	The names of the cookie that should be sent to the report server for single signon. Leave blank.
cps_auth_secret	The shared secret code Cognos 8 uses to encrypt an HTTP header variable that carries the user identity. This parameter represents the authorization secret that must be shared between the Cognos portlets and the Cognos 8 server. Consider this as a secret password. Use the same value that you used for **Shared Secret** in Cognos Configuration. For security reasons, we recommend you specify a non-null value.
cps_auth_namespace	The namespace ID for the Custom Java Provider.

3. Go to the *c8_location*/cps/plumtree directory and run the following build file:
   - On UNIX or Linux, **build.sh**
   - On Windows, **build.bat**

   This creates a cps-pt.war file in the *c8_location*/cps/plumtree/gadgets directory.
4. If Cognos 8 components are running using Tomcat,
   - Stop Cognos 8.
   - Copy the cps-pt.war file to the *c8_location*/webapps directory.

     Tomcat automatically expands the WAR file and starts the remote server.
   - Start Cognos 8.
5. If Cognos 8 components are running under another type of application server, copy the cps-pt.war file to the application server.

   For instructions, see the administration guide for your application server.

Single signon is configured.

Steps to Configure Properties for the Cognos WebPart for SharePoint Portal

1. Using a plain ASCII editor, such as Notepad, edit the web.config file in the *drive*\Program Files\Common Files\Microsoft Shared\web server extensions\60\CONFIG directory.
2. Find the following string:

   ```
   <SSO cps_auth_namespace="" cps_auth_secret="" />
   ```
3. Set cps_auth_namespace to the namespace ID for the Custom Java Provider namespace.
4. Set cps_auth_secret to the value that you used for **Shared Secret** in Cognos Configuration.

Enable Single Signon for SAP EP with the SAP Logon Ticket

If you enable single signon with the SAP Logon Ticket, you must configure Cognos 8 components with an SAP namespace that links to an SAP BW server.

Then you must copy the certificate that was generated during SAP EP installation to the SAP BW personal security environment.

Users must have the same user ID in all SAP systems that are accessed through single signon.

Before you start, ensure that you have

- configured Cognos 8 components to use an SAP authentication source

  For more information, see the *Installation and Configuration Guide*.
- enabled single signon between Cognos 8 components and SAP BW

  For more information, see the *Installation and Configuration Guide*.
- installed the latest service packs on the SAP BW server

Service packs can be downloaded from SAPNET.

- installed the latest hot patches for the SAP portal
- installed the Enterprise Portal plug-in that corresponds to the SAP EP release or SAP BW server

  For SAP releases earlier than 6.2, on SAPNET, download EP50_PLUG-IN for Basis 620 (SAPKINE32A). Using transaction SAINT, install SAPKINE32A.

- installed the SAP Security Library on the SAP BW servers

  From sapservX, under /general/misc/security/SAPSECU/platform, download sapsecin and sepsecu.dll and place both files in the /run directory of the SAP BW server.

To enable SSO for SAP EP, complete the procedures for single signon with SAP logon tickets in the SAP Enterprise Portal *Security Guide*.

Enable Single Signon for SAP EP with User Mapping

If you enable single signon with user mapping, you define a Cognos data source in SAP EP. Individual users or an administrator can enter the user IDs and passwords for Cognos 8 components in the data source. You must map the users logon credentials in the data source to an LDAP or Cognos Series 7 or NTLM namespace. Portal Services iViews transmit the logon credentials to Cognos 8 components using HTTP Basic Authentication.

Steps to Prepare the Environment

1. Configure the gateway URI that will be used by Portal Services to require authentication using HTTP Basic Authentication.

   For information about configuring a URL to use HTTP Basic Authentication, see the documentation for the gateway or for your Web server.

2. Adjust the iView configuration to access the secure URL.

   For information, see the documentation for your Web server.

3. In Cognos Configuration, configure a namespace to authenticate portal users.

   For instructions, see the topic about configuring LDAP, NTLM, or Cognos Series 7 authentication providers in the *Installation and Configuration Guide*.

4. If you use an LDAP namespace, configure the following properties:

   - For the **Use external identity** property, change the setting to **True**.
   - For the **External identity mapping** property, set it to

     (uid=${environment("REMOTE_USER")})

Other properties may be required. For more information, see the topic about configuring Cognos 8 components to use LDAP in the *Installation and Configuration Guide*.

Steps to Create the Data Source and Map the Users

1. In the SAP portal, ensure that the following properties are configured for the data source in the /PortalContent/other_vendors/every_user/com.cognos.pct.c8/systems/Cognos 8 directory:
   - **Logon Method** = UIDPW
   - **server name** = the name of the Cognos server
   - **port number** = port number of the gateway
   - **Protocol of Target system** = HTTP
   - **User Mapping Type** = admin,user
   - **system alias** (Create a system alias)

   For more information, see the SAP Enterprise Portal *Administration Guide*.
2. For each Cognos iView, enable user mapping for the data source by entering the name of the system alias at the iView level, in an attribute called **CPS: User Mapping Datasource**.

   For more information, see the SAP Enterprise Portal *Administration Guide*.
3. For each Cognos iView, set the **CPS: Authentication Namespace ID** property to the namespace that you want to use for authentication.
4. Register the Cognos credentials for the portal users.

   Users can enter their own user IDs and passwords.

   For more information, see the SAP Enterprise Portal *Administration Guide*.

We recommend that you enable secure communication between SAP EP and Cognos 8.

Enable Secure Communication Between SAP EP and Cognos 8 Components

A secure connection, using SSL, is not required between SAP EP and Cognos 8 components. It is more important if you enabled single signon with user mapping.

The SSL security supported by SAP uses encryption above 56 bits. By default, Cognos 8 components use an encryption algorithm up to 56 bits. Cognos provides an enhanced encryption module as a complementary product. To enable SSL, you must purchase and install the Enhanced Encryption Module for OpenSSL on top of Cognos 8 components. For more information, see the Cognos Enhanced Encryption Module for OpenSSL *Installation and Configuration Guide*.

To enable SSL between SAP EP and Cognos 8 components, see your SAP EP security documentation.

For more information about configuring SSL in Cognos 8 components, see the topic about configuring the SSL protocol in the *Installation and Configuration Guide*.

After SSL is enabled, edit properties for the all iViews so that the **cpsserver: CPS Connection Server** property uses https instead of http.

Enable Single Signon for WebSphere Portal Using the Application Server

The Portal Services portlets can use the Active Credentials objects provided by WebSphere Portal to connect to Cognos 8 components. Portal Services supports the following Active Credentials objects: HttpBasicAuth, LtpaToken, SiteMinderToken, and WebSealToken.

Credentials for the portal user are passed to the gateway using this object. For more information about Active Credential objects, see the documentation for IBM WebSphere Portal.

To use application server single signon, see the documentation for IBM WebSphere Application Server.

For information about SSL for Cognos 8 components on a WebSphere Application Server, see the topic about enabling SSL in the application server chapter of the *Installation and Configuration Guide*.

Enable Single Signon for Plumtree Portal Using Basic Authentication

You can configure a portlet in Plumtree Portal to send the username and password as an HTTP Basic authentication header. The header can be used with an NTLM, LDAP, or Cognos Series 7 authentication namespace to provide single signon.

Steps

1. In Cognos Configuration, configure a namespace to authenticate portal users.

   For instructions, see the topic about configuring LDAP, NTLM, or Cognos Series 7 authentication providers in the *Installation and Configuration Guide*.

2. Install an alternate CGI or ISAPI or servlet gateway in Cognos 8.

   For instructions, see the topic about installing Cognos 8 in the *Installation and Configuration Guide*.

3. Configure the gateway.

   For instructions, see the *Installation and Configuration Guide*.

4. In the administration console of the Web server, configure the virtual directories to access the gateway.

   For more information, see the documentation for your Web server.

5. Configure the Plumtree remote server to access Cognos 8:

   - Edit the cpspt.properties file in the *c8_location*/cps/plumtree/webapps/gadgets/WEB-INF/classes directory.

   - Change the cps_endpoint property to indicate the URL of the gateway.

     For a CGI gateway, you can use the default setting if the gateway and the remote server are on the same computer. Otherwise, replace the localhost portion with **host_name:port**

     For a servlet or ISAPI gateway, replace the localhost/cognos8/cgi-bin/cognos.cgi portion with the values to target the gateway.

For example,

http://*host_name*:*port*/cognos8/cgi-bin/cognos.isapi/wsrp/cps4/portlets/[package]?wsdl&b_action=cps.wsdl

- Set the **cps_auth_namespace** property to the namespace that you want to use for authentication.

Enable Single Signon for Plumtree Portal Using SiteMinder

If you use eTrust SiteMinder to provide single signon in your security infrastructure, you can also use it for single signon with Plumtree Portal.

You must configure a SiteMinder authentication namespace in Cognos 8. Plumtree Portal sends the SiteMinder active authentication token to the remote server, which sends the token to the Cognos 8 gateway.

Steps

1. In Cognos Configuration, configure a SiteMinder authentication namespace.

   For instructions, see the topic about configuring SiteMinder authentication namespaces in the *Installation and Configuration Guide*.

2. Configure the remote server to forward the authentication token:
   - Edit the cpspt.properties file in the *c8_location*/cps/Plumtree/webapps/gadgets/WEB-INF/classes directory.
   - Change the forward_cookies property to include the name of the active authentication token that SiteMinder provides.
   - Change the cps_endpoint property to indicate the URL of the gateway.

     For a CGI gateway, you can use the default setting if the gateway and the remote server are on the same computer. Otherwise, replace the localhost portion with ***host_name*:*port***.

     For a servlet or ISAPI gateway, replace the localhost/cognos8/cgi-bin/cognos.cgi portion with the values to target the gateway.

     For example,

     http://*host_name*:*port*/cognos8/cgi-bin/cognos.isapi/wsrp/cps4/portlets/[package]?wsdl&b_action=cps.wsdl

   - Change the **cps_auth_namespace** property to the namespace that you want to use for authentication.

Chapter 28: Customizing the Appearance of Cognos 8

You can customize the Cognos 8 interface to suit the needs of an international customer or a particular reseller. You can make changes to the colors, fonts, images, and overall appearance of one or more Cognos 8 components, simply by modifying the appropriate cascading style sheets (CSS), HTML content, and graphics.

Cognos 8 includes a selection of predefined styles that you can use to globally change the look of the graphical user interface, without affecting product functionality. You can also customize the following Cognos 8 components separately:

- Cognos Connection (p. 443)
- Report Studio (p. 446)
- Query Studio (p. 448)
- Cognos Viewer (p. 452)
- prompt pages (p. 454)

For more information about Cognos 8 customizations, see "Customizing the Functionality of Cognos 8" (p. 459).

Making Global Changes to all Components

You can make the following global changes to the appearance of all Cognos 8 components:

- customize the Cognos 8 styles
- rebrand the Cognos 8 interface
- change Cognos 8 fonts
- change the global Cognos 8 style sheet
- migrate changes to future releases

Customizing Styles

You can change the appearance of all the product component interfaces by using a different style (p. 399) in the *c8_location*/webcontent/skins directory. The style can be either a modified version of an existing predefined style (p. 440) or your own custom style (p. 440).

The Cognos 8 predefined styles include:

- business
- classic
- contemporary
- corporate (product default)
- modern
- presentation
- windows

Note: The windows style is used only with Report Studio. It adopts the display scheme specified by the Windows settings. This style must not be modified and none of the customization techniques described in this document apply to it.

Cognos 8 Components Affected by Styles

Each style has separate directories for the following components:

- Cognos Connection (job scheduling and query setting defaults)
- Report Studio (toolbox and preview window)
- Query Studio (filter dialogs and prompt pages)
- Cognos Viewer (reports and prompt pages)
- Analysis Studio
- Event Studio

Modifying a Style

You can modify an existing style, including the predefined styles, so that it matches your organization Web interface.

You can

- change colors, fonts, images, and some layout properties.

  Modify the associated style sheets in the *c8_location*/webcontent/skins/*style* directory.

- Rename the styles using **Cognos Administration** so that the names are more appropriate for your environment (p. 401).

- Rename the style directories in the *c8_location*/webcontent/skins directory.

  Do not rename the corporate directory (p. 441).

Create a Custom Style

You can create a custom style and make it available in Cognos 8.

We recommend that you use the existing style resources as a starting point. Change the style sheets, graphics, and fonts as required, but ensure that the structure of the custom style directory matches the structure of the predefined styles directories.

Steps

1. In the *c8_location*/webcontent/skins directory, make a copy of an existing style directory.
2. Rename the copied directory.
3. In the new directory, modify the style sheets, graphics, or fonts as required.
4. In **Cognos Administration**, add a new style object (p. 400) and associate it with the style directory created in step 2.

Modifying the Corporate Style for a Customized Environment

Corporate is the default style in Cognos 8. It is used when no other suitable style can be found, for example, at logon time when the user identity is unknown. A reference to the corporate directory is hard-coded in the product and this directory must always exist in the *c8_location*/webcontent/skins directory.

When you customize the styles, do not rename the corporate directory. However, you can modify the style sheets it contains to apply your company look and feel to the style this directory is associated with. You can also rename the corporate style object so that the name corporate does not appear in the user interface (p. 401).

Rebranding the Cognos 8 Interface

You can rebrand the product by globally replacing all instances of the Cognos name and logo with new text and appropriate brand images. Cognos resellers and partners may use a brand-neutral version of the Cognos 8 splash screen image.

Graphics for Cognos 8 are created using a Web-safe color palette. They are saved as non-interlaced GIF files. All interface icons are created with a transparent background, shown as the color Magenta.

Changing Brand-related Graphic

The brand-related graphics are grouped together in a directory named *c8_location*/webcontent/skins/*style*/branding where *style* represents each style directory (p. 439). Depending on the style you use, you change the graphics in the associated style directories.

You can replace individual Cognos 8 images, which are generally GIF files, with alternatives of a more suitable size or design. However, be careful when replacing similar-looking logos and icons. For example, the nested-square logo used to brand the Web portal (banner_cogsquare.gif) is not the same as the nested-square logo used in the About box (about.gif).

To help you locate the correct graphics, note that those used with the product components typically have file names beginning with the prefix tools_. This differentiates them from object or action-related graphics, which typically have file names beginning with the prefix icon_.

Tip: To change the text in a graphic, such as the acronym BI, open the relevant file in a graphics editor, replace the text, and resave the graphic in .GIF format.

Changing Component Names and Text Messages

You can change the names of Cognos 8 components and modify the accompanying text messages by opening the relevant message file in a text editor and performing a search-and-replace on the text strings and calls you want to change. The message files are located in the *c8_location*/msgsdk directory. For changes to take effect, you must restart the Cognos 8 service.

Adding Custom Messages

You can add your own custom messages, such as reseller copyright information, to the existing text in the About box. However, note that you are legally required to maintain the existing Cognos copyright notice.

Checking Global Text Changes

When you are finished making global text changes, we recommend that you check them in all the interfaces exposed to your users. Pay particular attention to browser page captions and generic dialog boxes, which are easy to miss.

Changing Cognos 8 Fonts

Cognos 8 style sheets specify text fonts that are suitable for UTF-8-encoded text. Relative font sizes are specified for interface text elements. Point sizes are specified for report text elements and form controls (input fields).

All text strings except the banner, company, and portal strings are language-sensitive. However, no banner string is used in Cognos Connection.

You can change the fonts used in Cognos 8 by modifying the font-family list in the file *c8_location*/webcontent/skins/*style*/fonts.css where *style* represents the style directory (p. 439). Modify the fonts.css file associated with the style you want.

For example, you can change the default font used on all HTML interfaces, except Report Studio, to one more suited to rendering special Asian characters. Open the file fonts.css in a text editor, comment out the section that shows Tahoma as the first item in the font-family list, and then remove the comment from an entry that better meets your Unicode requirements.

Note: Font changes do not apply to Report Studio, which has a separate font-setting style sheet (p. 446).

Changing the Global Cognos 8 Style Sheet

To globally change the default styles used for Cognos 8 reports, you can modify styles in the GlobalReportStyles.css file located in two directories, *c8_location*/bin and *c8_location*/webcontent/schemas. The file in the bin directory is used for PDF and Excel outputs, and the file in the webcontent directory is used for HTML output. The files in both directories must be modified to ensure that reports are rendered properly on both the server and the client systems. In a multiple

server configuration, the style sheets on all systems must be modified. On the Cognos 8 server system, this is the file in the *c8_location*/bin directory. On the Web server systems, this is the file in the *c8_location*/webcontent/schemas directory. For example, if you have 2 Cognos 8 servers and 3 Web servers, you must update 5 copies of the GlobalReportStyles.css file.

You can also add styles to this style sheet; however, a simpler alternative is to add a style to a template in Report Studio.

Any changes you make to this style sheet are lost if you reinstall or upgrade Cognos 8. If this happens, you must reapply your changes. For more information, see "Migrating Changes to Future Releases" (p. 443)

Both Report Studio and Query Studio use the GlobalReportStyles.css file to assign classes to report objects. Query Studio does not expose these classes. However, you can use Report Studio or the SDK to modify the class property of any report object. For example, if you create a default report and then click the title, the class property appears as Report Title Text. You can change this property as required.

If you decide to modify the GlobalReportStyles.css file, you must be aware that the class names that appear in Report Studio are multilingual and defined in the Report Studio resource files. Instead of modifying this style sheet, it may be simpler to add a new style into your report.

For more information about creating or modifying class styles, see the Report Studio *User Guide*.

When you work directly with an XML report specification, you can manually set the style of the object. For example, you can edit the report title, which may appear as follows:

```
<textItem class="reportTitleText">
 <text>
  My report title
 </text>
</textItem>
```

For more information about modifying styles in a report specification, see the *Developer Guide*.

Migrating Changes to Future Releases

Cognos 8 does not automatically preserve changes made to style sheets and other customization-related files. We recommend that you keep a careful record of your changes. Otherwise, you may inadvertently lose them during migration to a newer version of the product.

Modifying the Appearance of Cognos Connection

The style sheet default.css in the *c8_location*/webcontent/skins/*style*/portal directory defines the overall appearance of the Cognos Connection interface for each style (p. 439). Portal-specific graphics, if present, are located in the images subdirectory.

You make changes to the appearance of Cognos Connection by modifying the default.css file for the styles you want. Before you begin, we recommend that you back up the original default.css file.

Other changes to the appearance of Cognos Connection are made in the *c8_location*/templates/ps/portal/system.xml file.

Tip: Remember to restart Cognos 8 after completing your modifications, so that the changes take effect.

This documentation provides the following examples of customizations in Cognos Connection:

- Customizing the default Welcome page (p. 444)
- Changing the background color in the Cognos Connection main header (p. 445)
- Changing the branding details in the Cognos Connection main header (p. 444)
- Changing the portal graphics (p. 445)
- Changing the fonts for page titles and instructions (p. 446)

Example - Customize the Default Welcome Page

You can customize the default Welcome page to apply your organization look and feel to it. You can change the colors, fonts, graphics, and some layout properties.

To customize the Welcome page for the style you want, in the *c8_location*/webcontent/skins/*style*/portal/default.css file, search for the classes that start with `welcome` and modify the values as required.

Example - Change the Branding Details in the Cognos Connection Main Header

You can customize the Cognos Connection main header by changing the branding details on the left-hand side. You can change the graphic, the title, and the background color. This change affects also Cognos Viewer and the administration tools.

The branding details are defined by the `OEM` parameter in the portal system.xml file. You must modify this file.

Steps

1. Open the system.xml file in a text or XML editor.

   This file is located in the *c8_location*/templates/ps/portal directory.

2. Locate the `OEM` parameter and add the custom branding details as specified in the following code.

   The sequence in bold font must be repeated for each style in which you want this change to appear.

```
<param name="OEM">
  <customHeader showContext="true" contextDelimiter="-">
   <style styleFolderName="corporate"> <!--Insert well-formedHTMLhere --></
style>
    <style styleFolderName="classic">
    </style>
        ...
  </customHeader>
</param>
```

Setting the `showContext` attribute to true adds a report or a page name to the title. The `contextDelimiter` attribute, which can be represented by any character or sequence of characters, separates the title from the report or page name.

Here is a code example for this change:

```
<customHeader showContext="true" contextDelimiter="-
">
  <style styleFolderName="corporate">
   <table style="background-color:#ffffff">
    <tr>
     <td><img src="../skins/corporate/branding/my_logo.gif"/>
     </td><tdclass="headerTitle" style="padding-right:2px;white-space:
nowrap">Mycompany</td>
    </tr>
   </table>
  </style>
  <style styleFolderName="classic">
   <table style="background-color:#cccccc">
    <tr>
     <td><img src="../skins/corporate/branding/my_logo.gif"/>
      </td><tdclass="headerTitle" style="padding-right:2px;white-space:
nowrap">Mycompany
      </td>
     </tr>
   </table>
 </style>
</customHeader>
```

Example - Change the Background Color in the Cognos Connection Main Header

Suppose you want to change the background color used in the Cognos Connection header.

Open the *c8_location*/webcontent/skins/*style*/portal/default.css file in a text editor and, in the code specified below, change the value shown in bold font as required.

```
mainHeader1
{
 border-right: #000000 1px solid;
 border-left: #000000 1px solid;
 border-bottom: #000000 1px solid;
 background-color: #669966;
 height: 25px;
 background-image: url(Images/title_bar_grapic.gif);
 background-repeat: repeat-x;
 background-position: top;
}
```

Example - Change the Portal Graphics

Suppose you want to remove or replace some of the Web portal graphics for a specific style (p. 439). When replacing the images, we recommend that you retain the same file name.

The following table shows the files located in the directory *c8_location*/webcontent/skins/*style*/branding that supply the currently used images.

Contents	File
The splash screen image for Cognos Connection	branding/portal_splash.gif

Contents	File
The default Welcome page graphic	branding/welcome_back.gif
The About box graphic	branding/about.gif
The banner image	branding/banner_cogsquare.gif
The animated progress image	branding/progress.gif
The Cognos image that appears in the lower-right corner of the Welcome page	branding/cognos_sm.gif
The Cognos Connection icon	branding/icon_portal.gif
The watermark image that appears in the background of the About box.	branding/logowatermark.gif
The Cognos 8 image that appears in the Welcome pages and in the splash screens	branding/cognos_product_label.gif

Example - Change the Default Fonts for Page Titles and Instructions

Suppose you want to change the initial font settings for the page title and instructions. Depending on the product locale or other circumstances, you can specify a different font style and size.

In the *c8_location*/templates/ps/portal/system.xml file, find the section specified below, and change the values shown in bold font as required.

```
<param name="myPages">
 <param name="fontUnit">pt</param>
      <!-- pt or px or % -->
 <param name="defaultTitleFontFace">Tahoma</param>
 <param name="defaultTitleFontSize">12</param>
 <param name="defaultInstructionsFontFace">Tahoma</param>
 <param name="defaultInstructionsFontSize">11</param>
</param>
```

Modifying the Report Studio Style Sheets

The two predefined Report Studio styles are CRN (the current default) and windows. The windows folder contains styles that apply uniquely to Report Studio.

The customizable Report Studio style sheets are located in the directory *c8_location*/webcontent/skins/*style*/pat, or *c8_location*/webcontent/skins/*style*/hal, where style represents a specific style directory (p. 439). The style sheets in *c8_location*/webcontent/skins/windows/pat and *c8_location*/webcontent/skins/windows/hal must not be changed. Component-specific graphics are located in the images subdirectories of these directories.

The Report Studio style sheets are as follows.

Contents	File
Defines the default interface style for Report Studio, including a section that globally sets the font	*style*/pat/skin.css
Defines the default interface styles for menus and toolbars	*style*/hal/hal_*style*_skin.css
Defines a style that applies the user's chosen Microsoft Windows display settings to the Report Studio interface	windows/pat/skin.css

Example - Change the Fonts Used in Report Studio

Suppose you want to change the default font used in the HTML interface to one that properly renders special Asian characters. Open the *style*/pat/skin.css file in a text editor and comment out the section that shows Tahoma as the first item in the font-family list. Select or create an entry that better meets your Unicode requirements.

```
@charset "UTF-8";
DIV.clsToolbar,
...
DIV.clsTabPanels
{
 font-family:Tahoma, Arial, 'MS UI Gothic',
Gulim, SimSun, PMingLiU, Raghu8,
'Arial Unicode MS', 'Andale WT', sans-serif;
 font-size: 8pt;
}
```

Example - Change the Colors Used in Report Studio Menus

Suppose you want to change the colors used in the Report Studio menus. Open *c8_location*/webcontent/skins/*style*/hal/hal_*style*.css style sheet in a text editor and change the code shown in bold font to your preferred colors.

```
DIV.clsMenubar,
DIV.clsToolbar
{
 background-color: black;
 border-top: solid white 1px;
 border-bottom: solid #999999 1px;
 color: white;
}
TD.clsMenubarItem,
TD.clsToolbarButton
{
 background-color: white;
 color: black;
}
TD.clsMenubarItem,
TD.clsToolbarButton
{
 background-color: white;
 color: black;
}
```

Example - Change the Report Studio Graphics

Suppose you want to remove or replace some of the graphics used in Report Studio. When replacing images, we recommend that you retain the same directory structure and file name.

The following table shows which files supply the currently used images. They are located in the *c8_location*/webcontent/skins/*style*/branding directory.

Contents	File
The splash screen image specifically used for Report Studio, which appears in a frame, with a progress bar below it	branding/rs_splash.gif
The Welcome page banner image specifically used for Report Studio	branding/rs_welcome.gif
The About box graphic	branding/about.gif
The banner image	branding/banner_cogsquare.gif
The animated progress image	branding/progress.gif

Modifying the Query Studio Style Sheets

The Query Studio style sheets are located in the directory *c8_location*/webcontent/skins/*style*/qs. Graphics specific to a particular component style, such as banner.gif, are located in the images subdirectory.

The Query Studio style sheets are as follows.

Contents	File
Defines context menu styles for Query Studio. Uses points to reference font sizes.	QSReport.css
Defines report styles for Query Studio, such as the appearances of selected columns, columns that are cut, or columns that have the pointer paused over them.	QSSelection.css
Defines styles for the Query Studio and Cognos Viewer interfaces, including the application title area, left pane menu, toolbar, metadata tree, preview pane, and navigation links.	QSRVCommonUI.css
Defines styles for the Query Studio and Cognos Viewer dialog boxes. This file is used only to avoid having to include large .css files for every dialog box.	QSRVDialog.css

Example - Change the Colors Used in Query Studio Menus

Suppose you want to change the colors used in Query Studio menus. Open the QSRVCommonUI.css style sheet in a text editor and change the code shown in bold font to your preferred colors.

```
.menuHeader
{
 font-size: 70%;
 color: #336699;
 border-collapse: collapse;
 font-weight: bold;
 ...
}
.menuItem,
.menuItemSpacer,
.menuItemSpacerTop
{
 background-color: #E3E9F3;
 border: solid #336699;
 border-width: 0px 1px;
 border-collapse: collapse;
}
.menuItem
{
 font-size: 70%;
 color: 336699;
 padding: 3px 5px;
 text-decoration: underline;
 cursor: pointer;
 cursor: hand;
}
.menuItemSelected
{
 color: 336699;
 border-collapse: collapse;
 cursor: default;
 padding: 3px 10px;
 border: 1px solid #336699;
 height:20px;
 font-size: 70%;
 font-weight: bold;
}
```

Example - Change the Query Studio Graphics

Suppose you want to remove or replace some of the graphics used in Query Studio. The branding-related graphics are grouped together in the *c8_location*/webcontent/skins/*style*/branding directory. Graphics specific to the Query Studio component, such as banner.gif, are located in the images subdirectory of the directory *c8_location*/webcontent/skins/*style*/qs.

When replacing images, we recommend that you retain the same directory structure and file names, as shown in the following table.

Contents	File
The About box graphic	branding/about.gif
The banner image	branding/banner_cogsquare.gif

Contents	File
The animated progress image	branding/progress.gif

Note: Query Studio has no splash screen or Welcome banner.

Customize the Query Studio Toolbar and Menus

You can customize the Query Studio toolbar and menus by adding or removing buttons, menus, and menu items.

Steps to Add a Toolbar Button

1. Stop the Cognos 8 service.
2. Open the file *c8_location*/templates/ps/qs/ui.xml in an XML or text editor.
3. Insert the following XML code for the new button:

```
<button>
 <name>
 Name_of_button
 </name>
 <link>
 getConfigFrame().JavascriptFunction()
 </link>
 <tooltip>
 Localized String
 </tooltip>
 <icon state="active">Path to icon graphic image
 </icon>
 <icon state="inactive">
 Path to icon graphic image
 </icon>
</button>
```

   Tip: You can specify separators between toolbar buttons or groups of toolbar buttons by inserting a `<separator/>` tag between buttons.

4. Save and close the file.
5. Open the file *c8_location*/webcontent/qs/cmd.js in a text editor, and add a Javascript function that corresponds to the *JavascriptFunction* for the new button.
6. Save and close the file.
7. Start the Cognos 8 service.

   Tip: To change the function called by a toolbar button, add a new Javascript function to the cms.js file and change the *JavascriptFunction* in the toolbar.xml file to call the new function.

Steps to Remove a Toolbar Button

1. Stop the Cognos 8 service.
2. Open the file *c8_location*/templates/ps/qs/ui.xml in an XML or text editor.

3. Delete the XML code that corresponds to the toolbar button you want to remove, beginning with the <button> tag and ending with the </button> tag.
4. Save and close the file.
5. Start the Cognos 8 service.

Steps to Add a Menu Item

1. Stop the Cognos 8 service.
2. Open the file *c8_location*/templates/ps/qs/ui.xml in an XML or text editor.
3. Insert the following XML code for the new menu item. If you do not want an icon to represent the menu item, do not include the icon element.

```
<menuItem>
 <name>
  Localized String
 </name>
 <tooltip>
  Localized String
 </tooltip>
 <link>
  getConfigFrame().JavascriptFunction()
 </link>
 <icon>
  Path to icon graphic image
 </icon>
</menuItem>
```

   Tip: You can specify separators between menu items or groups of menu items by inserting a <separator/> tag between menuItems.

4. Save and close the file.
5. Open the file *c8_location*/webcontent/qs/cmd.js in a text editor, and add a Javascript function that corresponds to the *JavascriptFunction* for the new menu item.
6. Save and close the file.
7. Start the Cognos 8 service.

   Tip: To change the function called by a menu item, add a new Javascript function to thecms. js file and change the JavascriptFunction in the menu.xml file to call the new function.

Steps to Remove a Menu Item

1. Stop the Cognos 8 service.
2. Open the file *c8_location*/templates/ps/qs/ui.xml in an XML or text editor.
3. Delete the XML code that corresponds to the menu item you want to remove, beginning with the <menuItem> tag and ending with the </menuItem> tag.
4. Save and close the file.

5. Start the Cognos 8 service.

Steps to Add a Menu

1. Stop the Cognos 8 service.
2. Open the file *c8_location*/templates/ps/qs/menu.xml in an XML or text editor.
3. Insert the following XML code for the new menu. The name of the menu is the label shown for the menu in the user interface. The value of the `alias` attribute, used to identify the menu, must not contain any spaces.

```
<menu alias="non_localized_string">
 <name>
  Localized String
 </name>
 <menuItem>
  ...
 </menuItem>
 <menuItem>
  ...
 </menuItem>
  ...
</menu>
```

   Tip: You can specify separators between menu items or groups of menu items by inserting a `<separator/>` tag between menuItems.
4. Save and close the file
5. Start the Cognos 8 service.

Steps to Remove a Menu

1. Stop the Cognos 8 service.
2. Open the file *c8_location*/templates/ps/qs/menu.xml in an XML or text editor.
3. Delete the XML code that corresponds to the menu you want to remove, beginning with the `<menu>` tag and ending with the `</menu>` tag.
4. Save and close the file.
5. Start the Cognos 8 service.

Modifying the Appearance of Cognos Viewer

You can make the following changes to the appearance of all Cognos Viewer:

- modify the Cognos Viewer style sheets
- change the language of the user interface

Modifying the Cognos Viewer Style Sheets

You can modify the Cognos Viewer style sheets at the same time as you customize the Query Studio interface, or as a separate exercise.

The relevant style sheets are located in the directory *c8_location*/webcontent/skins/*style*/qs. Graphics specific to a particular component style, such as banner.gif, are located in the images subdirectory.

The Cognos Viewer style sheets are as follows.

Contents	File
Defines report styles for Cognos Viewer.	RVReport.css
Defines styles for the Query Studio and Cognos Viewer interfaces, including the application title area and navigation links.	QSRVCommonUI.css

Example - Change the Language of the Cognos Viewer User Interface

When you view content, such as reports, in Cognos Viewer in a language other than English, French, German, or Japanese, you may want to see the Cognos Viewer user interface in the same language. This requires changing the product language in Cognos Viewer using Cognos Configuration, and later selecting this language in Cognos Connection. Ensure that Cognos Viewer is translated into the language you want to use.

Suppose you want to change the Cognos Viewer user interface to Greek for users of reports in Greek. At the same time, you want the user interface of other Cognos components, such as Cognos Connection and the studios, appear in French. To make these changes, perform the following steps.

Steps to Add a New Product Language

1. Start Cognos Configuration.
2. From the **Actions** menu, click **Edit Global Configuration**.
3. Click the **Product Locales** tab.
4. Click the **Add** button.
5. Type the locale code for Greek, which is `el`

   Greek will appear in the list of available product languages in Cognos Connection, in **My Preferences**.

   Tip: You can see the locale codes for other languages on the **Content Locales** tab.
6. Click **OK**.
7. Save the configuration.
8. Go to Cognos Connection.

9. Click **My Area** , **My Preferences**.
10. On the **General** tab, in the **Product Language** drop-down list, click Greek.
11. Click **OK**.

The Cognos Viewer user interface appears in Greek. However, other components, such as Cognos Connection and the studios, continue using the default product language, which is English. To specify French as the default product language if Greek is used by the Cognos Viewer user interface, add a new product locale mapping using Cognos Configuration.

Note: Only languages for which a full translation of the Cognos 8 user interface exists can be specified as the default product languages.

Steps to Add a New Product Locale Mapping

1. Start Cognos Configuration.
2. From the **Actions** menu, click **Edit Global Configuration**.
3. Click the **Product Locale Mappings** tab.
4. Click the **Add** button.
5. Map the product languages in the following way:
   - In the **Key** column, type the code for Greek, which is `el-*`
   - In the **Locale Mapping** column, type the code for French, which is `fr`
6. Click **OK**.
7. Save the configuration.

When a user opens a report in Cognos Viewer in Greek, the Cognos Viewer user interface also appears in Greek. The user interface of other components, such as Cognos Connection and the studios, appears in French.

Modifying the Prompt Page Style Sheets

You can change the style definitions for the prompt pages and related controls used with all Cognos 8 components by modifying the shared promptCommon.css style sheet.

This style sheet is located in the directory *c8_location*/webcontent/skins/*style*/prompting. Prompting graphics specific to a style, if present, are located in the images subdirectory.

You can modify this prompt page style sheet in much the same way as you customize any of the component style sheets.

Adding Custom Report Templates for Report Studio

Report Studio has predefined report templates that you select from when you create a new report. You can create your own custom report templates and make them available too.

To add a custom report template, you must

- create a report specification for the template (p. 455)
- add a custom report template to the templates.xml file (p. 457)
- provide an icon for the template (p. 457)
- add template information to the Resources.xml file (p. 457)

Note: When you reinstall or upgrade Cognos 8, the changes associated with the custom report templates are not migrated. You may need to redo the above steps (p. 443).

Create a Report Specification for a Custom Report Template

There is no template object in Cognos 8. Instead, you can use any report specification as a report template. You can create the report specification for your custom report template by using Report Studio, an XML editor, or a text editor.

Steps for Report Studio

1. Open Report Studio.
2. Create a new report.

   For more information, see the Report Studio *User Guide*.
3. From the **File** menu, click **Convert to Template**.
4. From the **Tools** menu, click **Copy Report to Clipboard** to save the report specification XML.
5. Paste the report specification into an XML editor or text editor.
6. Delete the following information, which Report Studio adds to the XML file and which is not necessary for the template:
   - The `xmlns` attribute of the `report` element.
   - The `template` attribute of the `report` element.
   - The value of the `name` attribute of the `query` element. Delete the value, but leave the double quotation marks.
   - The value of the `name` attribute of the `page` element. Delete the value, but leave the double quotation marks.
   - The value of the `refQuery` attribute of the `list` element.
7. Add a new `template` element as a parent of the `report` element.

8. Add a `name` attribute for the `template` element.

   The name you enter appears as the name of the template in the new report dialog box.

9. Save the report specification.

Here is an example of the initial part of a report specification created in Report Studio. The portions to delete appear in bold.

```
 <template name="CognosList">
   ...
   <report xmlns="http://developer.cognos.com/schemas/report/4.0/"
expressionLocale="en" template="true"><!--RS:8.2-->
  <queries>
   <query name="Query1">
     <source>
        <model/>
     </source>
     <selection/>
   </query>
 </queries>
 <layouts>
   <layout>
    <reportPages>
      <page class="pg" name="Page1">
        <pageBody class="pb">
          <contents>
            <list class="ls" refQuery="Query1">
              <style>
                <CSS value="border-collapse:collapse"/>
              </style>
             </list>
               ..................
   </report>
  </template>
```

Steps for an XML Editor or Text Editor

1. Open the report specification in an XML editor or text editor.

2. Add the elements you want to appear in your template.

   For more information, see the *Developer Guide*.

3. Add a new `template` element as a parent of the `report` element.

   The name you enter appears as the name of the template in the new report dialog box.

4. Add a `name` attribute to the template element.

   The name you enter appears as the name of the template in the new report dialog box.

5. Save the report specification.

Add a Custom Report Template to the templates.xml File

The Templates.xml file contains the templates that you select from when you create a new report in Report Studio. You must add your custom report template to this file.

Steps

1. Open the templates.xml file.

   This file is located in the *c8_location*/webcontent/pat/res directory.

2. Copy the XML code for the custom report template into the file.

   The `template` element must be a child element of the `xmlFragment` element.

3. Add the `<modelPath/>` directive.

   Here is an partial example of the XML for the template created in the previous task (p. 455).

   ```
   <xmlFragment> template name="CognosList"> <report> <modelPath/> ... </
   template> </xmlFragment>
   ```

4. Save and close the file.

Provide an Icon for the Custom Report Template

You can create an icon that you want to represent the custom report template. The icons in the new report dialog box are 32 x 32 pixels .gif images.

You can use any graphic editor to create the icon.

Steps

1. Create the icon you want.
2. Copy the image file into the *c8_location*/webcontent/pat/images directory.

Add Template Information to the Resources.xml File

The Resources.xml file defines the content of the new report dialog box in Report Studio. You must modify this file by adding the information that refers to the custom report template.

For the `listItems` element, you add a new `listItem` element that represents the new template. The `listItem` element must have the following attributes.

Attribute	Description
idsLabel	Specifies an ID that refers to a Report Studio string resource file located in the *c8_location*/webcontent/pat/res directory, and a label for the template that appears in the new report dialog box. Use this attribute when you want to add the ID and label for your custom template in the string resource file. You use the string resource file when you want the label to appear in multiple languages.
label	Specifies a label for the template that appears in the new report dialog box. Use this attribute instead of the idsLabel attribute for the custom template when you do not want the label to appear in multiple languages, which eliminates the need to use the string resource file.
icon	Specifies an image file associated with the template, located in the *c8_location*/webcontent/pat/images directory. The image appears as an icon in the new report dialog box. Use a previously created image file for the custom report template.

Steps

1. Open the Resources.xml.

   This file is located in the *c8_location*/webcontent/pat/res.

2. Add a new `listItem` element using the `label` or `idsLabel` attribute for the custom report template.

   Here is an example of the edited file:

```
<listView id="text-align">
  <listItems>
   <listItem value="" idsLabel="IDS_PROPVAL_DEFAULT"
    smallIcon="default_prop_value.gif"/>
   <listItem value="left" idsLabel="IDS_PROPVAL_TALIGN_LEFT"
    smallIcon="hal/images/btn_align_left.gif"/>
   <listItem value="center" idsLabel="IDS_PROPVAL_TALIGN_CENTER"
    smallIcon="hal/images/btn_align_center.gif"/>
   <listItem value="right" idsLabel="IDS_PROPVAL_TALIGN_RIGHT"
    smallIcon="hal/images/btn_align_right.gif"/>
   <listItem value="justify" idsLabel="IDS_PROPVAL_TALIGN_JUSTIFY"
    smallIcon="hal/images/btn_align_justify.gif"/>
  </listItems>
 </listView>
```

3. Save and close the file.

You must now restart Report Studio for the custom report template to appear in the new report dialog box.

Chapter 29: Customizing the Functionality of Cognos 8

You can customize how Cognos 8 works to suit your particular needs.

Presentation services in Cognos 8 maintain XML-based system configuration files named system.xml that are used to customize the product user interface and functionality. Before you start customizing Cognos 8, you may want to migrate the customization changes made in the ReportNet system.xml files (p. 459).

You can implement the following customizations:

- Customize Cognos Connection (p. 460)
- Start Query Studio in Preview Mode (p. 477)
- Customize Query Studio Data Formats (p. 478)
- Change the Default Template for Query Studio (p. 483)
- Modify Properties for the CSV Output Format (p. 484)
- Prevent users from sending reports as email attachments (p. 488)
- Show attachments in IBM Lotus Notes (p. 488)
- Disable support for trigger-based scheduling (p. 489)
- Set up trigger occurrences on a server (p. 490)
- Hide history summary counts (p. 491)

For more information about Cognos 8 customizations, see "Customizing the Appearance of Cognos 8" (p. 439).

Upgrade the ReportNet system.xml Files to Cognos 8

The Cognos 8 presentation service supports automatic upgrade of the ReportNet system.xml files. You can use this approach if many customization changes were made in ReportNet and implementing them manually in Cognos 8 would be time-consuming.

The system.xml files are upgraded to a Cognos 8 compatible version. All existing ReportNet system.xml parameters can be upgraded to Cognos 8.

If the automatic upgrade is not successful, the system.xml file is not upgraded successfully and a message is generated in the server log.

You can perform the upgrade manually using one of the following files in the *c8_location*/templates/ps directory:

- for UNIX, system_upgrade.sh
- for Windows, system_upgrade.bat

For more information, see the system_upgrade.txt file in the same directory.

Note: As a general approach, we recommend that you edit the system.xml files manually using a UTF-8-based XML or text editor.

Perform the following steps when Cognos 8 and ReportNet are installed in different locations.

Steps

1. Back up the original Cognos 8 versions and the customized ReportNet versions of the system.xml files.
2. Copy the required system.xml file from the ReportNet installation directory to the corresponding directory in the Cognos 8 installation directory.

   Copy all system.xml files that require upgrade. The process cannot be repeated for each file separately.

   For example: copy the system.xml file from the *crn_location*/templates/ps directory to the *c8_location*/templates/ps directory.
3. Restart the Cognos 8 service.

Customizing Cognos Connection

You can do the following to customize Cognos Connection:

- Add or hide user interface elements based on groups and roles (p. 460).
- Hide and disable the new URL button(p. 466).
- Limit the number of entries that users can cut, copy, and paste (p. 467).
- Customize object actions (p. 467).
- Restrict content browsing (p. 470).
- Implement a custom Welcome page (p. 472).
- Customize report output formats in Cognos Connection and Cognos Viewer (p. 475).
- Customize the document lookup table (p. 477).

Add or Hide User Interface Elements Based on Groups and Roles

You can customize the Cognos Connection user interface based on the group and role membership. Depending on the group or role to which users belong, certain user interface elements will or will

not be available to them. For example, you can hide the preferences and studio links from some users and add links to external applications for other users.

To implement this functionality, perform the following tasks:

- Hide user interface elements (p. 461)
- Add user interface elements (p. 463)
- Reference the required groups or roles in the system.xml file (p. 465)

Some user interface elements are shared by Cognos Connection and Cognos Viewer, for example the top header (m1). If you hide these shared interface elements in Cognos Connection, they are also hidden in Cognos Viewer.

For a list of elements you can hide and add, see "User Interface Elements Reference List" (p. 645).

Note: It is important to note that there is a difference between hiding a UI element and disabling it. Hiding means that the element will no longer be visible, but that the functionality is still available. Disabling a UI element means that the element is not visible and that the underlying functionality is no longer available.

Hide User Interface Elements

You can use URL commands to hide user interface elements for a session, or you can edit the system.xml file to hide user interface elements permanently.

When you hide user interface elements in page headers, these elements are not hidden elsewhere in Cognos 8. For example, Report Studio can be run from the body of the Welcome page or from the h1 header. Hiding the Cognos 8 header using the URL command does not hide Report Studio link in the body of the Welcome page.

Using URL Commands

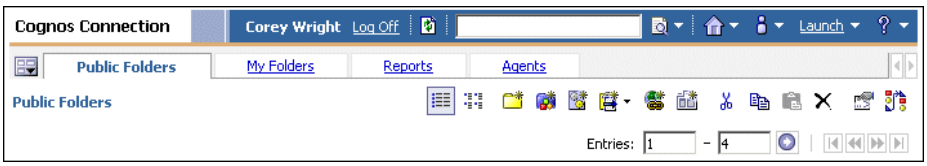
Type URL commands in your browser if you want to hide user interface elements for the current Cognos 8 request or session only. You can use URL commands to hide UI elements for both Cognos Connection and Cognos Viewer.

Cognos Connection commands can only be appended to Cognos Connection URLs, and Cognos Viewer commands can only be appended to Cognos Viewer URLs. For example, adding *&ui=t3m4* at the end of a Cognos Viewer URL does not affect Cognos Connection.

Cognos Viewer commands do not affect the Cognos Connection user interface. For example, adding the Cognos Viewer command *&tb=0* at the end of a Cognos Connection URL will show no effect.

However, Cognos Connection commands may affect Cognos Viewer indirectly. For example, hiding the top header in Cognos Connection will also hide the header in Cognos Viewer.

The following example shows the headers in the Cognos Connection main page.



You can use URL commands to hide the following Cognos Connection headers or sections of a header:

- the Cognos Connection top header (h1) that includes the title (t1), the Launch menu (m1). and all right-hand side header options.
- the tab bar (h3) that includes tabs such as Public Folders, My Folders, and My custom page (t3).
- the Cognos Connection header (h4) that includes the navigation path (t4), and the toolbar menu (m4).

Using the System.xml File

To hide all instances of a user interface element in Cognos Connection, you must modify the system.xml file.

Modifying the system.xml file is more flexible than using URL commands for these reasons:

- You can hide more user interface elements.
- You can restrict the appearance of user interface elements based on user type or membership in groups and roles.

Steps Using URL Commands in Cognos Connection

1. Start Cognos 8.
2. In Cognos Connection, click in the Web address box and type the following at the end of the URL:

   &ui=*user_interface_elements_to_hide*

   where user_interface_elements_to_hide is one or more of t1, t4, m1, m4, h1, h3, or h4.

   For example, type:

   &ui=h1m4

   The hidden UI remains hidden for the rest of the user session.
3. To restore the hidden elements, type **&ui=** at the end of the URL.

Steps Using URL Commands in Cognos Viewer When Viewing Reports

1. Start Cognos 8.
2. In Cognos Viewer, click in the Web address box and type on of the following at the end of the URL:
3. - To turn off the Cognos Viewer toolbar, type:

     ui.toolbar=false

   - To turn off the Cognos Viewer header, type:

     ui.header=false

The hidden UI remains hidden for the rest of the user request.

Steps Using the System.xml File

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Use the following syntax in the `<system>` element to hide a user interface element:

   ```
   <param name="ui_hide">
    <!--list of user interface elements-->
   </param>
   ```

   For example, the following XML code hides the entire Cognos Connection header and the New Job button in the toolbar:

   ```
   <param name="ui_hide">
    <CC_HEADER/>
    <CC_TOOLBAR_BUTTONS_newjobDefinition/>
   </param>
   ```

   For information about all the user interface elements that you can hide, see "Elements You Can Hide" (p. 645). Ensure that you match the case of each user interface element you want to hide.
4. Specify one or more groups or roles you want to view the hidden element by adding their IDs as values of the `show` attribute.

   Use the group or role IDs as documented in the topic "Reference the Required Groups or Roles in the system.xml File " (p. 465).

   Separate IDs using spaces.

   Here is an example:

   ```
   <param name="ui_hide">
    <CRN_HEADER show="Administrators g1 g2 RSUsers"/>
   </param>
   ```
5. Repeat steps 3 to 4 for each element that you want to hide.
6. Save the file.
7. Start the Cognos 8 service.

Tip: There can be only one `<param name="ui_hide">` element in system.xml. Therefore, all items you want to hide must be placed inside this element.

Add User Interface Elements

You can add user interface elements to Cognos Connection to connect to external applications or to modify the functionality of Cognos Connection. You can restrict the appearance of these new user interface elements based on different types of users.

The `xml:lang` attribute of the `label` and `tooltip` elements corresponds to the product locale in use at the time of the portal page generation. If a new product locale is added to Cognos 8, you must add a translation for the label and tooltip fields. When no label or tooltip is found that matches the product locale, nothing is displayed.

The graphic referenced by the `icon` element must exist in the *c8_location*/webcontent/ps/portal/images directory.

To add a user interface element in Cognos Connection, you must modify the system.xml file.

Steps

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Use the following syntax in the `<system>` element to add a user interface element:

```
<param name="ui_add">
<!--list of user interface elements-->
</param>
```

For example, the following XML code adds an option to start a Google search in a new browser window.

```
<param name="ui_add">
 <CRN_HEADER_OPTIONS>
  <item>
   <url>http://www.google.com</url>
   <target>_blank</target>
   <label xml:lang="en">Google</label>
   <tooltip xml:lang="en">Google</tooltip>
   <label xml:lang="fr">Google</label>
   <tooltip xml:lang="fr">Google</tooltip>
   <label xml:lang="de">Google</label>
   <tooltip xml:lang="de">Google</tooltip>
   <label xml:lang="ja">Google</label>
   <tooltip xml:lang="ja">Google</tooltip>
   <icon>action_search.gif</icon>
  </item>
 </CRN_HEADER_OPTIONS>
</param>
```

For information about all the user interface elements that you can add, see "Elements You Can Add" (p. 652). Ensure that you match the case of each user interface element you want to add.

4. Specify one or more groups or roles you want to view the new interface element by adding their IDs as values of the `show` attribute.

Use the IDs as documented in the topic "Reference the Required Groups or Roles in the system.xml File " (p. 465). Separate IDs using spaces.

Here is an example:

```
<param name="ui_add">
 <CC_VIEW_TOOLS>
  <item show="Administrators RSUsers g1 g2">
   <url>http://my_server_url/myApplication</url>
   <target>_blank</target>
   <label xml:lang="en">My_label in English</label>
   <label xml:lang="fr">My_label in French</label>
   <label xml:lang="de">My_label in German</label>
   <label xml:lang="ja">My_label in Japanese</label>
  </item>
 </CC_VIEW_TOOLS>
</param>
```

5. Save the file.
6. Restart the Cognos 8 service.

Tip: There can be only one `<param name="ui_add">` element in system.xml. Therefore, all items you want to add must be placed inside this element.

Reference the Required Groups or Roles in the system.xml File

Before you start implementing the customization changes in the Cognos Connection user interface, you must identify the groups or roles on which your customizations will be based.

Add a reference about the groups or roles you want to use to the portal system.xml file. Modify this file by adding the `ui_groups` parameter and listing all required groups and roles within this parameter. Each group or role is represented by the `group` element that must contain a unique `id` attribute. The value of the `id` attribute is specified in the group or role search path in Cognos Connection.

Include only the groups and roles you want to use for the purpose of hiding or adding user interface elements. The groups and roles must already exist in Cognos 8 and can be associated with any namespace configured for your Cognos 8 environment. You can use the predefined groups and roles (p. 207), or your custom groups and roles (p. 186).

The predefined groups and roles that can be used include:

User	Description	ID
Anonymous	Users who can access Cognos 8 without being prompted for authentication	Anonymous
Administrators	Users who have the administration capability	Administrators
Consumers	All authenticated users, which includes Administrators, Query Studio Users, and Report Studio Users	Consumers
Query Studio Users	Users who have the Query Studio capability	QSUsers
Report Studio Users	Users who have the Report Studio capability	RSUsers

Steps

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.

3. Add a parameter named `ui_groups` and then do the following:
   - Add the `group` element for each group or role you want.
   - Specify a unique `id` attribute for each group or role.

     The IDs are case sensitive.

     For the custom groups or roles, the IDs cannot contain more than two characters, and cannot contain spaces. For example, the following IDs can be used: a1, b2, Ab, AB. The following IDs cannot be used: abc, A 1, a bc.

     For the Cognos 8 predefined groups, use the associated IDs as documented the table above.
   - Specify a value for the `id` attribute for each group element.

     Tip: To find the ID in Cognos Connection, open the group or role properties page and, on the **General** tab, click the **View the search path, ID and URL** link.

   The following example shows the syntax of the `ui_groups` parameter.

```
<param name="ui_groups">
 <group id="g1">xOm5ldyBncm91cHM6dWlHMV9lbg_</group>
 <group id="g2">xOm5ldyBncm91cHM6dWlfUjI_</group>
 <group id="55">xOf5ldyBnc4htcHM6dAlfUjI_</group>
</param>
```

4. Save the system.xml file.
5. Restart the Cognos 8 service.

Hide and Disable the New URL Button

Hiding UI elements such as toolbar buttons allows you to declutter the UI, but hiding alone will not disable the functionality behind the UI element. For security reasons, if you want to hide the new URL button, it is best to disable it. Doing so hides the button, but more importantly, eliminates the possibility of someone adding an undesirable URL.

Steps

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Add the following parameter:

```
<param name="disableURLObjectCreation">true</param>
```

4. Save the system.xml file.
5. Restart the Cognos 8 service.

   The new URL toolbar button is removed, the URL field on the object creation wizard is disabled, and all URL object creation requests on the server handler will be ignored.

Limit the Number of Entries That Users Can Cut, Copy, and Paste

You can limit the number of entries that users can cut, copy, and paste to improve the performance of Cognos 8. This allows you to control the storage space taken up by temporary entries and reduce the time required to execute cut, copy, and paste requests.

For example, you can set the limit to 50 entries. If users cut, copy, or paste more than 50 entries, they receive a maximum entries message.

For more information about other tasks you can perform to improve the performance of Cognos 8, see "Tune Server Performance" (p. 121).

To change the limit, you must have access to the computer where the report server is installed.

Steps

1. On each computer where Cognos 8 is installed, open the *c8_location*/templates/ps/portal/system.xml file in an editor.

   Ensure that your editor supports saving files in UTF-8 format.

2. Find and edit the `maxEditEntries` parameter as follows:

   ```
   <param name="maxEditEntries">
    50
   </param>
   ```

3. Save the system.xml file.

4. Stop and then restart the Cognos 8 service.

   For more information about stopping Cognos 8, see the *Installation and Configuration Guide*.

Customizing Object Actions

You can customize the actions available for package, folder, URL, jobDefinition, query, report, reportView in Cognos Connection.

For a list of actions that you can customize, you can look at the *c8_location*/templates/ps/portal/system.xml file. Search for "base-object-actions".

Remove an Action

To remove an action for a class of objects, such as reports, in the Cognos Connection user interface, you must modify the system.xml file. When you remove an action, users no longer have access to it.

Steps

1. Stop the Cognos 8 service.

2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.

3. Locate the following XML code that describes the actions for the objects in Cognos Connection:

   ```
   <param name="base-object-actions">
     <actions>
       ...
   ```

```
  </actions>
</param>
```

4. Remove the action

   For example, the following XML code describes the actions for reports:

```
<param name="base-object-actions">
  <actions>
    ...
    <object class="report">
      ...
      <action name="run_options"/>
      ...
    </object>
    ...
  </actions>
</param>
```

   Remove the following line:

```
<action name="run_options"/>
```

   The run options action is no longer available in Cognos Connection for reports.

5. Save the file.

6. Start the Cognos 8 service.

Expose a Shortcut Action

A shortcut action gives users the ability to create shortcuts to a class of objects. By default, shortcut actions appear on the Cognos Connection actions page.

To add a shortcut action for a class of objects, such as reports, to the Cognos Connection main page, you must modify the system.xml file.

Steps

1. Stop the Cognos 8 service.

2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.

3. Locate the following XML code that describes the actions for the objects in Cognos Connection:

```
<param name="base-object-actions">
  <actions>
    ...
  </actions>
</param>
```

4. Add the following line of XML code to the actions for the class of objects:

```
<action name="shortcut" visible="main"/>
```

   For example, the following XML code includes a shortcut action in the actions for folders:

```
<param name="base-object-actions">
  <actions>
    ...
    <object class="folder">
      <action name="shortcut" visible="main"/>
    </object>
    ...
  </actions>
</param>
```

5. Save the file.
6. Start the Cognos 8 service.

Add a Custom Action

To add a custom action for package, folder, URL, jobDefinition, query, report, or reportView objects in the Cognos Connection user interface, you must modify the system.xml file. Add a custom action when you want to run an SDK application for a particular class of object, such as a report. You can pass the following properties of an object to an application:

- defaultName
- defaultOutputFormat
- searchPath
- uri
- permissions
- usage
- disabled

In the Cognos Connection main view, custom action icons appear to the left of the More link. In the Perform an action dialog box, custom actions appear under the Cognos-specified actions.

Steps

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Locate the following XML code that describes the actions for the objects in Cognos Connection:

```
<param name="base-object-actions">
  <actions>
    ...
  </actions>
</param>
```

4. Use the following syntax to add a custom action as a child of the `<object>` element for the class of object you want to associate the custom action with. The `<object>` elements are children of the `<actions>` element. Note that an English tooltip and label are required.

```
<action name="name" type="custom">
  <icon>
    icon to show for this element
</icon>
  <url>
    http-encoded URL to execute
  </url>
  <label xml:lang="en">
    link text
  </label>
  <tooltip xml:lang="en">
    tooltip text
  </tooltip>
  <label xml:lang="language">
```

```
    link text
  </label>
  <tooltip xml:lang="language">
    tooltip text
  </tooltip>
  <objProperties encode="encoding">
    <property>
      property to be passed to application
    </property>
  </objProperties>
</action>
```

For example, the following XML code defines a custom action for a report object that launches an ASP application named myapp. The *defaultName* and *searchPath* properties of the report are passed to the application.

```
<param name="base-object-actions">
  <actions>
    ...
    <object class="report">
      ...
      <action name="showPath" type="custom">
        <icon>
          action_myaction.gif
        </icon>
        <url>
          /myapp.asp</url>
        <label xml:lang="en">
          View the search path
        </label>
        <tooltip xml:lang="en">
          View the search path
        </tooltip>
        <label xml:lang="fr">
          Afficher le chemin d'accès
        </label>
        <tooltip xml:lang="fr">
          Afficher le chemin d'accès
        </tooltip>
        <objProperties encode="shift_jis">
          <property>
            defaultName
          </property>
          <property>
            searchPath
          </property>
        </objProperties>
      </action>
    </object>
    ...
  </actions>
</param>
```

5. Save the file.

6. Start the Cognos 8 service.

Restrict Content Browsing

By default, Cognos Connection users can browse public folders starting at the root content folder (/content). You may want to restrict the folders that users can browse. You can set the root content folder that users can browse to any path for:

- a given session, using the URL interface
- all sessions, using a system setting in the system.xml file

  This setting does not apply to administrators.

Root Content Folder Changes

When you specify a root other than the root content folder, the following changes occur:

- Content navigation is restricted to the root folder and its subfolders.
- Search results are limited to objects that are contained in the root folder and its subfolders.
- The Location property in the Properties dialog box shows the path beginning at the root folder.
- The choice of destination folders when a consumer creates new content is limited to the root folder and its subfolders.

Considerations

Specifying a root folder other than the root content folder does not restrict administrative functions such as schedule management.

Restricting content browsing by specifying a new root folder is not a means of enforcing security. Folder access must be controlled using the Cognos 8 security model.

Steps Using a URL Command

1. Start Cognos 8.
2. Click in the Web address box and delete any path parameters specified by &m_path.

   If you do not remove these path parameters, they override the root setting.
3. Type the following at the end of the URL:

   &m_root=*url-encoded search path*

   For example, if you want to restrict browsing to the Go Sales package, while hiding the tab bar, toolbar and standard Cognos 8 header options, type the following:

   &m_root=%2Fcontent%2Fpackage%5B%40name%3D'GO%20Sales'%5D&ui=m1h3m4.

Steps Using the System.xml File

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Modify the `<param name="consumer-root">` line in the following way:

   `<param name="consumer-root">`*search path*`</param>`

   For example, typing the following sets the root folder to a folder named Folder1 in the package named Pack1.

```
<param name="consumer-root">
  /content/package[@name='Pack1']/folder[@name='Folder1']</param>
```

4. Save the file.
5. Start the Cognos 8 service.

Implementing a Custom Welcome Page

You can create a custom Welcome page and configure Cognos Connection to use this page instead of the default page provided by Cognos 8.

The custom Welcome page can be any type of a browser page, such as .html, .asp, or .jsp. To provide Welcome pages that are locale- and style-sensitive, you must create a separate page for each language and style (p. 399).

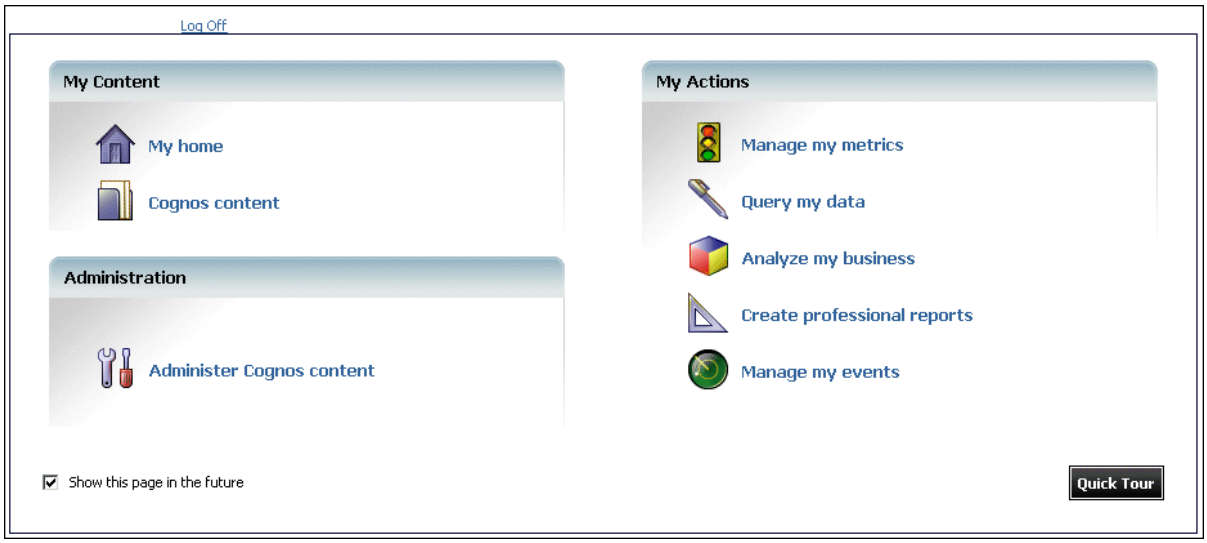
When you create a custom Welcome page, you can reuse some elements from the default Welcome page to make your job easier (p. 472).

After the page is created, configure your Web server and your application server to expose the new Welcome page (p. 473), and configure Cognos Connection to use it (p. 474).

Reuse Elements From the Default Welcome Page

There are elements in the Cognos 8 Welcome page that may be difficult to implement, especially the logon link and the links to different studios. To make your job easier, you can reuse these elements from the default Welcome page. You can create a page with any content that, through an iFrame, frame, and so on, references the links-only section of the Welcome page.

The links-only page will look like this.



If you want to change the background color, modify the `welcomeToolPanel` parameter in the default.css file associated with the style you are using. For more information, see "Example - Customize the Default Welcome Page" (p. 444).

Steps

1. In a text editor, such as Notepad, type the code for the page using the following parameters in the page URL.

Parameter	Values	Description
basewelcome	yes no	Renders the default Welcome page that contains only the links. This parameter is mandatory.
wtarget	top parent self (default)	Specifies where the links should appear in the custom Welcome page. This parameter is optional. If you want the links to appear in the same frame, do not include this parameter.

The following URL renders the links-only, default Welcome page:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=cognosViewer&m=portal/
welcome/welcome.xts&basewelcome=yes&wtarget=top
```

For example, if you want to create a custom Welcome page with only one iFrame that uses the links-only page, the source code for the page could be as follows:

```
<html>
<head></head>
<body>
<iframe width="100%" height="100%"
src="http://localhost/cognos8/cgi-bin/cognos.
cgi?b_action=cognosViewer&m=portal/welcome/welcome.
xts&basewelcome=yes&wtarget=top"/>
</body>
</html>
```

2. Save the file.

Create the Required Directories

After the custom Welcome page is created, you must save it in a directory that can be accessed by Cognos 8. We recommend that you place your file in a directory that is separate from your Cognos 8 installation.

If you create your page as a set of HTML pages, you can set up a virtual directory for your custom Welcome page. For example, you can create the my_welcome virtual directory in *c8_location**my_welcome,* where *my_welcome* is the location of your custom Welcome page, and grant read permissions for the directory.

After the virtual directory is set up, you can save the custom Welcome page in it. If you create custom pages for different locales and styles, you must create directories for each locale and style. The directories must be named after the style and locale.

For example, if you want to provide a custom Welcome page for the English, French, German, and Japanese locales for all the predefined styles, you must create the following directory structure for each of the en, fr, de, and ja locales, where *my_welcome* is the virtual directory, and then copy the individual custom Welcome pages into the proper directories.

- *my_welcome*/*locale*/business

- *my_welcome/locale/*classic
- *my_welcome/locale/*contemporary
- *my_welcome/locale/*corporate
- *my_welcome/locale/*modern
- *my_welcome/locale/*presentation

For more information about setting up virtual directories, see the *Installation and Configuration Guide*.

Configure Cognos Connection to Use a Custom Welcome Page

You configure Cognos Connection to use a custom Welcome page by adding the `welcomeURLOverride` parameter to the system.xml file located in the *c8_location*/templates/ps/portal directory.

The `welcomeURLOverride` parameter overrides the default Welcome page URL. Depending on the location of the custom Welcome page, the URL can be specified as a relative or absolute path.

Note: The path names are case sensitive on UNIX.

Locale and Style Considerations

If you want to implement a custom Welcome page that is style and locale-sensitive, the page URL must use the exposed replacement parameters for the locale and style. The parameters are `%LOCALE%` and `%STYLE%`. When the URL is processed, `%LOCALE%` is replaced by the product locale, and `%STYLE%` is replaced by the user's currently selected style.

For example, if the product language is English and the style is Corporate, the welcomeURLOverride parameter is as follows:

```
<param name=
"welcomeURLOverride">/cognos8/my_welcome/%LOCLAE%/%STYLE%/customwel.htm
<param>
```

When the URL is processed, the `%LOCALE%` parameter is replaced with en, and the `%STYLE%` parameter is replaced with Corporate. The URL for this example is as follows:

```
/cognos8/my_welcome/en/Corporate/customwel.htm
```

If the product locale were set to French and the style to Classic, the URL would be as follows:

```
/cognos8/my_welcome/fr/Classic/customwel.htm
```

Steps

1. From the *c8_location*/templates/ps/portal directory, open the system.xml file.
2. Add the welcomeURLOverride parameter to the file, where customwel.htm is the custom Welcome page.

   If you use a relative path, the syntax is:

   ```
   <param name="welcomeURLOverride">/cognos8/customwel.htm
   </param>
   ```

   If you use an absolute path, the syntax is:

```
<param name="welcomeURLOverride">http://.../customwel.htm
</param>
```

If your Welcome page supports different locales and styles and you use a relative path, the syntax is:

```
<param name="welcomeURLOverride">/cognos8/my_welcome/%LOCALE%/%STYLE%/
customwel.htm
<param>
```

3. Save and close the system.xml file.
4. Refresh Cognos Connection.

Customize Report Output Formats in Cognos Connection and Cognos Viewer

You can specify which formats are available for users to view their reports. For example, you may want to prevent users from exporting reports in Excel.

The report formats available to a user appear in the user preferences (p. 231).

The report formats are controlled by the `format` element of the `reportFormats` parameter in the system.xml file located in the *c8_location*/templates/ps directory.

The `format` element has the following attributes:

Attribute	Value	Description
id	Report output formats, such as HTML or PDF	Specifies the supported report format. This attribute cannot be modified.
browserHide	• ie • safari • moz • other	Excludes Web browsers in which the report format should be hidden from users. You can modify this attribute.
downloadable	• true • false	Specifies the download support. You can modify this attribute
appMode	• basic Refers to the basic run options and preferences. • adv Refers to the advanced run options and scheduling. • rv Refers to the report viewing options.	Specifies the Cognos 8 functions where the report format must be supported. You can modify this attribute.

Attribute	Value	Description
extension	refers to extensions, such as xls	Optional attribute that specifies the file extension of the output format. It is used to control download functionality.
mime	refers to a mime value, such as application/vnd.ms-excel	Optional attribute that specifies the MIME type. It is used to control download functionality.
cafaction	• true • false	Specifies the Cognos Application Firewall settings. This attribute cannot be modified.

Note: Because the `format` element settings can be used to control access to output formats, this setting can affect how reports that were saved previously are accessed. For example, if a report is saved in PDF format, users cannot view the saved report if the administrator chooses to make the PDF format unavailable.

The following example shows how to remove CSV format from the list of available format options, for example, when setting personal preferences or scheduling reports, while still allowing users access to saved CSV output in the portal.

```
<format id="CSV" browserHide="" downloadable="true"
appMode="" extension="csv"/>
```

The following example shows how to hide the report output completely.

```
<!--<format id="CSV" browserHide=""
downloadable="true" appMode="" extension="csv"/> -->
```

Steps

1. Open the system.xml file in the *c8_location*/templates/ps directory.
2. In the following code, remove or comment out the `format` element associated with the report format you want to disable.

```
<param name="reportFormats">
<!-- Comments -->
 <format id="HTML" browserHide="" downloadable="false"
appMode="basic adv rv"/>
 <format id="XHTML" browserHide="" downloadable="false"
appMode="adv"/>
 <format id="HTMLFragment" browserHide="" downloadable="false" appMode="adv"/
>
 <format id="PDF" browserHide="" downloadable="true"
appMode="basic adv rv" extension="pdf"/> -->
 <format id="spreadsheetML" browserHide="safari" downloadable="true"
appMode="basic adv rv" extension="xlsx"/>
 <format id="XLWA" browserHide="safari" downloadable="true" appMode="basic
adv rv" extension="xls" mime="application/vnd.ms-excel"/>
 <format id="singleXLS" browserHide="safari" downloadable="true"
appMode="basic adv rv" extension="xls"/>
 <format id="XLS" browserHide="safari moz other" downloadable="false"
```

```
appMode="basic adv rv" cafaction="true"/>
 <format id="CSV" browserHide="" downloadable="true"
appMode="basic adv rv" extension="csv"/>
 <format id="XML" browserHide="" downloadable="true"
appMode="basic adv rv" extension="xml"/>
</param>
```

The following example shows how to disable the PDF format:

```
<!-- <format id="PDF" browserHide=""
downloadable="true" appMode="basic adv rv"/> -->
```

The following example shows how to disable support for the CSV format for advanced run options and scheduling by deleting the `adv` attribute:

```
<format id="CSV" browserHide="" downloadable="true"
appMode="basic rv"/>
```

3. Save the system.xml file.
4. Restart the Cognos 8 service.

Note that the configuration settings you specify in the system.xml file apply only to the presentation services which includes the portal, portal administration, and Cognos Viewer. The settings do not apply to the report server.

Configure the Document Lookup Table

The document format lookup table is used to look up file extensions when downloading document objects. Most browsers require file extensions to determine which program to use to open the file. If the name of the file being downloaded does not end with the expected extension, the portal will append one based on the document lookup table, found in the system.xml file.

The following example shows the document format code:

```
<param name="documentFormats">
 <format extension="doc" id="application/vnd.coc-wd"/>
 <format extension="xls" id="application/vnd.coc-xl"/>
 <format extension="ppt" id="application/vnd.coc-pp"/>
 <format extension="xlsx"  id="application/vnd.openxmlformats-officedocument.
spreadsheet.sheet"/>
 <format extension="pptx" id="application/vnd.openxmlformats-officedocument.
presentationml.presentation"/>
 <format extension="docx" id="application/vnd.openxmlformats-officedocument.
wordprocessingml.document"/>
</param>
```

Start Query Studio in Preview Mode

You can configure Query Studio to start in preview mode. Users can then create or modify reports without retrieving actual data from the database. Instead, simulated data is shown.

If you later upgrade Cognos 8, you must reapply this configuration.

Steps

1. Using Cognos Configuration, stop Cognos 8.
2. Rename the *c8_location*\templates\ps\async\system.xml.sample file to system.xml.

Tip: To restore the regular mode, rename the *c8_location*\templates\ps\async\system.xml file to system.xml.sample.

3. Using Cognos Configuration, start Cognos 8.

Customizing Data Formats for Query Studio

You can customize the data formats that are available for selection in Query Studio. The data formats listed in the following table are defined in the *c8_location*/configuration/cogformat.xml file.

Data format	Examples	XML code
Date	19/12/03 December 19, 2003	formatList name = qsdates
Time	11:05 PM 23:05	formatList name = qstimes
Date and time	19/12/03 13:30 Dec 19, 03 1:30 PM	formatList name = qsdatetimes
Time interval	Days Seconds Milliseconds	formatList name = qsintervals
Negative numbers	-29 (29)	formatList name = qsnegatives
Decimal character	1.23 1,23	formatList name = rsnumberinput

By modifying the cogformat.xml file, you can change the order in which data formats are presented in Query Studio. You can also change the text string that appears in Query Studio or delete a data format.

If the data formats that you prefer are not available in Query Studio, you can add them to the file.

Note: If you upgrade to a new version of Cognos 8, your changes to the cogformat.xml file are not reflected in the new version of the file. Make a copy of the file before the upgrade, then replace the new version with your changed version.

Modify the cogformat.xml File

To modify the cogformat.xml file, follow these steps:

Steps

1. Make a backup of the *c8_location*/configuration/cogformat.xml file.
2. Stop the Cognos 8 service.
3. Open the cogformat.xml file in an XML or text editor.
4. Make your changes as required:
   - "Change the Order of Data Formats" (p. 479)
   - "Change the Text Strings" (p. 480)
   - "Remove Data Formats" (p. 481)
   - "Add a Data Format to a Locale" (p. 481)
   - "Add Data Formats for a New Locale" (p. 482)
5. Save the file.
6. Test the file.
7. Restart the Cognos 8 service.

   The changes that you made to the cogformat.xml file are implemented.

Change the Order of Data Formats

You can modify the cogformat.xml file to change the order in which data formats are presented in Query Studio. For example, in your locale, the dates might be presented in the following order:

- 19/12/03
- 19-Dec-03
- December 19, 2003
- Friday, December 19, 2003

If your users are most likely to choose the last date format, you might want it to appear first on the list of dates.

Steps

1. In the cogformat.xml file, locate the data format for the locale that you want to modify. For example, the following XML code defines the order of date formats for the en-CA (English Canadian) locale:

```
...
<formatList name="qsdates" xml:lang="en-CA">
  <dateFormat dateStyle="short">19/12/03</dateFormat>
```

```
  <dateFormat dateStyle="medium">19-Dec-03</dateFormat>
  <dateFormat dateStyle="long">December 19, 2003</dateFormat>
  <dateFormat dateStyle="full">Friday, December 19,
2003</dateFormat>
</formatList>
...
```

2. To change the order in which data formats appear in Query Studio, rearrange the order of the code. For example, to have Friday, December 19, 2003 appear as the first date format, change the XML code as follows:

```
...
<formatList name="qsdates" xml:lang="en-CA">
  <dateFormat dateStyle="full">Friday, December 19,
2003</dateFormat>
  <dateFormat dateStyle="short">19/12/03</dateFormat>
  <dateFormat dateStyle="medium">19-Dec-03</dateFormat>
  <dateFormat dateStyle="long">December 19, 2003</dateFormat>
</formatList>
...
```

   The dates are now presented in the following order in Query Studio:

   - Friday, December 19, 2003
   - 19/12/03
   - 19-Dec-03
   - December 19, 2003

Change the Text Strings

You can modify the cogformat.xml file to change the text strings that are presented in Query Studio. For example, in your locale, the dates might be presented as follows:

19/12/03

19-Dec-03

December 19, 2003

Friday, December 19, 2003

If your organization uses the standard date format "19/12/03," you can change the text that appears in Query Studio to "Corporate Standard (19/12/03)".

Steps

1. In the cogformat.xml file, locate the date format for the locale you want to modify. For example, the following XML code defines the text strings for date formats for the en-CA (English Canadian) locale:

```
...
<formatList name="qsdates" xml:lang="en-CA">
  <dateFormat dateStyle="short">19/12/03</dateFormat>
  <dateFormat dateStyle="medium">19-Dec-03</dateFormat>
  <dateFormat dateStyle="long">December 19, 2003</dateFormat>
  <dateFormat dateStyle="full">Friday, December 19,
2003</dateFormat>
```

```
</formatList>
...
```

2. To change the text string for a data format, edit it in the XML code. For example, change the text string for that format as follows:

```
<dateFormat dateStyle="short">Corporate Standard
(19/12/03)</dateFormat>
```

The dates now appear as follows:

- Corporate Standard (19/12/03)
- 19-Dec-03
- December 19, 2003
- Friday, December 19, 2003

Remove Data Formats

You can modify the cogformat.xml file to remove data formats. For example, you may not want to present users with all the interval formats that are available.

Steps

1. In the cogformat.xml file, locate the data format for the locale that you want to modify. For example, the following XML code defines time interval formats for the en-CA (English Canadian) locale:

```
...
<formatList name="qsintervals" xml:lang="en-ca">
  <intervalFormat units="days">2 days</intervalFormat>
  <intervalFormat>1 day 23 hours 45 minutes 12 seconds 345 milliseconds</
intervalFormat>
  <intervalFormat units="time" showSeconds="false">1
23:45</intervalFormat>
  <intervalFormat units="time" showMilliseconds="false">1 23:45:12</
intervalFormat>
</formatList>
...
```

2. To remove an interval format, remove the associated XML code line. For example, to remove milliseconds as an available interval format, remove the following line:

```
<intervalFormat units="time" showMilliseconds="false">1 23:45:12</
intervalFormat>
```

Note: For information on removing a locale, see the *Installation and Configuration Guide*.

Add a Data Format to a Locale

You can modify the cogformat.xml file to add data formats. For example, you may want to add a time format that is not included for your locale.

Valid Syntax

You must use valid syntax when adding a data format.

You can use Report Studio to show you the XML code that you need for a data format. In Report Studio, create a list report that contains the data that you want. Then, select the column and change the Data Format settings in the Report Studio Properties pane to get the format you want. It's a good idea to run the report to make sure the data format looks the way you want it to. Select View XML and use the same code syntax in the cogformat.xml file. (For an XML file that you can copy and paste from, follow instructions to Open and Save a Report Locally.)

For example, if you want to add a data format for date, create a report that contains a date column. Change the format of the date. Use the appropriate XML code syntax in the cogformat.xml file.

Your syntax might look similar to the bold code shown below:

```
<formatList name="qsdates" xml:lang="en-CA">
  <dateFormat dateStyle="short" datesSeparator="."
  </dateFormat>
  <dateFormat dateStyle="full">Friday, December 19,
2003</dateFormat>
  <dateFormat dateStyle="short">19/12/03</dateFormat>
  <dateFormat dateStyle="medium">19-Dec-03</dateFormat>
  <dateFormat dateStyle="long">December 19, 2003</dateFormat>
</formatList>
```

Steps

1. In the cogformat.xml file, locate the data format for the locale that you want to modify. For example, the following XML code defines time formats for the en-CA (English Canadian) locale:

   ```
   ...
   <formatList name="qstimes" xml:lang="en-ca">
     <timeFormat timeStyle="short">1:30 PM</timeFormat>
     <timeFormat timeStyle="medium">1:30:55 PM</timeFormat>
     <timeFormat timeStyle="long">1:30:55 EST PM</timeFormat>
     <timeFormat timeStyle="full">1:30:55 o&apos;clock
   PM EST</timeFormat>
   </formatList>...
   ```

2. To add another time format, add another XML code line. For example, to add the time format "1:30 EST PM," add the following line:

   ```
   <timeFormat timeStyle="long" showSeconds="false">1:30
   EST PM</timeFormat>
   ```

3. Insert the text that you want to appear in Query Studio into the line you copied and pasted. For example:

   ```
   <dateFormat dateStyle="short" dateSeparator="."
   show Years="showCentury">19.12.03</dateFormat>
   ```

Add Data Formats for a New Locale

The cogformat.xml file contains most locales already. However, if necessary, you can add data formats for a new locale. Add a block of XML code for each of the data formats type.

Steps

1. Copy and paste a similar block of XML code for each data format type. For example, if you want to add a new locale such as en-xx, copy and paste the XML code that defines time formats for the en-CA (English Canadian) locale:

```
...
<formatList name="qstimes" xml:lang="en-ca">
  <timeFormat timeStyle="short">1:30 PM</timeFormat>
  <timeFormat timeStyle="medium">1:30:55 PM</timeFormat>
  <timeFormat timeStyle="long">1:30:55 EST PM</timeFormat>
  <timeFormat timeStyle="full">1:30:55 o&apos;clock
PM EST</timeFormat>
</formatList>...
```

2. Change the name of the locale. For example, for the new locale en-xx, change the first line of the copied code to:

```
<formatList name="qstimes" xml:lang="en-xx">
```

3. Change the data formats as required, following the instructions in one of the following sections:
   - "Change the Order of Data Formats" (p. 479)
   - "Change the Text Strings" (p. 480)
   - "Remove Data Formats" (p. 481)
   - "Add Data Formats for a New Locale" (p. 482)
4. Make similar changes for the other data format types for the new locale.

Change the Default Query Studio Template

All Query Studio reports use a default template. You can create a custom template, for example, to include your company logo in it, and set it up as the default template for Query Studio reports.

The templates are created in Report Studio. For more information, see the Report Studio *User Guide*.

Steps

1. Go to the *c8_location*/configuration directory.
2. Locate the file qrsvpproperties.xml.sample, and rename it to qrsvpproperties.xml.
3. Open the qrsvpproperties.xml file, and in the following code:

```
<structure>
 <!-- Default template for reports. -->
 <!--<property>defaultSystemTemplate</property>
-->
 <!--<value>/content/configuration/reportTemplate[@name='QSdefault']
       </value> -->
</structure>
```

   - Un-comment the property and value elements
   - For the value, type the search path of the new template.

   Tip: To find the template search path in Cognos Connection, open the template properties page and, on the **General** tab, click the **View the search path, ID and URL** link.

   Following, is an example of the resulting code:

```
<structure>
 <!-- Default template for reports. -->
```

```
 <property>defaultSystemTemplate</property>
 <value>/content/package[@name='GO
Sales and Retailers']/folder[@name="Templates
"]/reportTemplate[@name='RS
template']
 </value>
</structure>
```

4. Save the qrsvpproperties.xml file.
5. Restart the Cognos 8 server.

Modify Properties for the CSV Output Format

You can modify properties for the comma separated values (CSV) output format. For example, you can specify encoding and field delimiter characters to suit your environment.

The CSV properties are system-wide settings and cannot be specified for specific reports.

Note: Always set the CSV output format at the server administration level. Do not override CSV output format settings at lower levels.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. From the **System** drop-down menu, click **Set properties**.
5. Click the **Settings** tab.
6. Next to **Environment**, **Advanced Settings**, click **Edit**.
7. Enter parameters and values from "CSV Properties and Values" (p. 484), as required.
8. Click **OK**.

After the 30 seconds required for your changes to take effect, your changes are reflected when reports are generated in CSV format.

CSV Properties and Values

The following table describes the CSV properties that you can modify. If a property is not specified or its value is empty, the default setting is used.

Parameter	Description	Default
RSVP.CSV.ENCODING	The encoding used for CSV output. Enter one of the following: a supported encoding value (p. 486) LOCALE Encoding is derived from the content locale.	utf-16le
RSVP.CSV.DELIMITER	The field delimiter character used for CSV output. Enter one of the following: a single character If you enter more than one character, only the first character is used. TAB (tab) LOCALE Delimiter is derived from the content locale.	TAB
RSVP.CSV.QUALIFIER	The string qualifier used for CSV output. Enter a single character. If you enter more than one character, only the first character is used. If the qualifier appears as part of your data, it is duplicated. For example, if the qualifier is a quotation mark and your data is ab"cd, the CSV output is "ab""cd".	" (quotation mark)
RSVP.CSV.TERMINATOR	The line terminator used for CSV output. Enter one of the following: a single character If you enter more than one character, only the first character is used. CR (carriage return) LF (line feed) CRLF (carriage return/line feed) LFCR (line feed/carriage return)	LF
RSVP.CSV.MIMETYPE	The MIME type attributed to the CSV output.	application/ vnd.ms-excel/

Supported Encoding Values

The following table shows encoding values that are supported and tested by Cognos.

Character set	Supported encoding value
UTF-8	utf-8
Western European (ISO 8859-1)	iso-8859-1
Western European (ISO 8859-15)	iso-8859-15
Western European (Windows-1252)	windows-1252
Central and Eastern European(ISO 8859-2)	iso-8859-2
Central and Eastern European (Windows-1250)	windows-1250
Cyrillic (ISO 8859-5)	iso-8859-5
Cyrillic (Windows-1251)	windows-1251
Turkish (ISO 8859-9)	iso-8859-9
Turkish (Windows-1254)	windows-1254
Greek (ISO 8859-7)	iso-8859-7
Greek (Windows-1253)	windows-1253
Japanese (EUC-JP)	euc-jp
Japanese (ISO-2022-JP)	iso-2202-jp
Japanese (Shift-JIS)	shift_jis
Traditional Chinese (Big5)	big5
Simplified Chinese (GB-2312)	gb2312
Korean (EUC-KR)	euc-kr
Korean (ISO 2022-KR)	ISO 2022-KR
Korean (KSC-5601)	ksc_5601

Character set	Supported encoding value
Thai (Windows-874)	windows-874
Thai (TIS-620)	tis-620

Modify Properties for the Batch Report Service and Report Service

You can modify advanced properties for the Batch Report service and the Report service. For example, you can specify that prompt values entered by a user be saved automatically.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. From the **All Servers** drop-down menu, click **Services**, **Batch Report**.
5. From the drop-down menu for **BatchReportService**, click **Set properties**.
6. Click the **Settings** tab.
7. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
8. If it appears, select the **Override the settings acquired from the parent entry** check box. Otherwise, proceed to the next step.
9. Enter parameters and values from "Batch Report Service and Report Service Properties and Values" (p. 487), as required.
10. Click **OK**.

Batch Report Service and Report Service Properties and Values

The following table describes the Batch Report service and Report service properties that you can modify. If a property is not specified or its value is empty, the default setting is used.

Parameter	Description	Default
RSVP.PARAMETERS.SAVE	Specifies that report prompt values entered by a user should be saved automatically.	false

Parameter	Description	Default
RSVP.CHARTS. ALTERNATECOLOURS	Specifies that each chart instance assigns colors in palette order, and does not attempt to preserve the color of items from one chart instance to another.	false
RSVP.FILE.EXTENSION.XLS	Specifies to use XLS as the file extension on XLS output format email attachments instead of HTML.	false

Disable Report Attachments in Email Messages

To prevent users from sending reports as email attachments, modify the system file system.xml. This change hides the Include the report check box under Attachments in the Set the email options dialog box.

This restriction applies to all Cognos 8 users.

Steps

1. Stop the Cognos 8 service
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Add the following XML code to the `<system>` element:

   ```
   <param name="ui_hide">
     <CC_RUN_OPTIONS_email_attachment/>
   </param>
   ```

   If you hide other user interface elements by modifying the system.xml file (p. 463), the `<param name="ui_hide">` element already exists. In this case, add the following to the element:

   ```
   <CC_RUN_OPTIONS_email_attachment/>
   ```
4. Save the file.
5. Start the Cognos 8 service.

Show Attachments in IBM Lotus Notes

When chart reports are sent as email attachments, they may not be shown properly in Lotus Notes. You can specify that .png file types be automatically converted to .jpg to avoid this possibility.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch, Cognos Administration**.

3. On the **Status** tab, click **System**.
4. From the **All Servers** drop-down menu, click **Services**, **Delivery**.
5. For the drop-down menu next to **DeliveryService**, click **Set properties**.
6. Click the **Settings** tab.
7. Next to **Environment**, click **Edit**.
8. Select the **Override the settings acquired from the parent entry** check box.
9. In the **Parameter** column, type the parameter name **lotus.compatibility.mode**.
10. In the **Value** column, type **true**.
11. Click **OK**.
12. In the **Set properties** page, click **OK**.

Chart reports are converted to .jpg files and appear properly in Lotus Notes.

Disable Support for Trigger-based Scheduling

By default, trigger-based scheduling (p. 275) is enabled. An occurrence acts as a trigger, causing the report to run. You can disable this feature by modifying the system.xml file.

Steps

1. Stop the Cognos 8 service.
2. Open the *c8_location*/templates/ps/portal/system.xml file in an XML or text editor.
3. Locate the following XML code in the `system` element:

```
<param name="enable-trigger-support">
  true
</param>
<param name="enable-trigger-tab">
  true
</param>
```

4. Change the value of both trigger parameters from true to false.

   The XML code should appear as follows:

```
<param name="enable-trigger-support">
  false
</param>
<param name="enable-trigger-tab">
  false
</param>
```

5. Save the file.
6. Start the Cognos 8 service.

The **By Trigger** tab on the **Schedule** page no longer appears. Entries that are already scheduled for trigger-based scheduling continue to run, but no further trigger scheduling can occur while support is disabled.

Set Up a Trigger Occurrence on a Server

As part of setting up trigger-based report scheduling (p. 275), you must set up the trigger occurrence on a server. You link the external occurrence, such as a database refresh or an email, with a trigger on the server that causes the entry to run. You must also specify the name of the occurrence.

Trigger occurrences can also be set up by an SDK developer using the Cognos 8 software development kit (SDK). For more information, see the *The Cognos 8 SDK Developer Guide*.

Scripts

Using the Windows script named trigger.bat or the shell script named trigger.sh, you can trigger one or more schedules to run on the server.

The script syntax follows where `URL` is the Cognos 8 server URL, `username` is a valid username in the specified namespace, `password` is the password for the username, `namespace` is the namespace for the username, and `triggerlist` is a comma separated list of trigger names:

```
trigger.bat URL [username password namespace]
triggerlist
```

For example, if users want to schedule a report based on a database refresh and want to schedule a second report based on receipt of an email, your custom trigger command line may look similar to this:

```
trigger.bat http://localhost:9300/p2pd/servlet/dispatch username
password namespace databaserefreshtriggername,emailtriggername
```

Steps

1. If you are setting up a trigger occurrence on a server other than a Cognos 8 server, complete the following tasks:
   - Ensure that the server has either a Java Runtime Environment or a Java Development Kit, version 1.3 or higher.
   - Copy the following files from *c8_location*/webapps/p2pd/WEB-INF/lib on a Cognos 8 server to the location on the server where you are setting up the trigger occurrence:

     activation.jar

     axis.jar

     axisCrnpClient.jar

     commons-discovery.jar

     commons-logging.jar

     jaxrpc.jar

     saaj.jar

mail.jar

xml-apis.jar

xercesImpl.jar

- Copy the following files from *c8_location*/webapps/EventTrigger on a Cognos 8 server, to the location on the server where you are setting up the trigger occurrence:

  trigger.bat

  trigger.sh

  trigger.class (a Java utility that can run on any Cognos-supported platform)

2. Ensure that the command line runs when the external occurrence, such as a database refresh or email, occurs.

   The mechanism that you use to invoke your custom trigger command depends on the application that you are working with, such as a database system or an email application. For information, see the documentation for your application.

3. Inform users that they can now schedule entries based on the trigger occurrence.

   If a user scheduled an entry based on the occurrence, when the user clicks the schedule button for a report view, occurrence information replaces frequency information on the **Schedule** page.

If a user scheduled an entry based on the occurrence, when the user clicks the schedule button for a report view, occurrence information replaces frequency information on the Schedule page.

After the script runs, the trigger method returns an integer value representing the number of schedules that were run. The following integers represent errors:

- -1 is a usage error, such as invalid parameter or syntax
- -2 is a communication problem with Cognos 8 server

Hide History Summary Counts

By default, the Schedule Management Activity tab shows the counts of the various run histories for your reports and jobs.

Tip: To view history summary counts, in Cognos Connection, click the **Schedule Management** link. In the **Activity** tab, summary counts appear at the right.

You can disable history summary counts this feature by modifying the system system.xml file.

Steps

1. Stop the Cognos 8 service.
2. Open the system.xml file in a text editor.

   The file is located in *c8_location*/templates/ps/portal.

3. Locate the following XML code within the `system` element:

```
<param name="enable-history-counts">
  true
</param>
```

4. Change the value of the enable-history-counts parameter from true to false. The XML code should appear as follows:

```
<param name="enable-history-counts">
  false
</param>
```

5. Save the file.

6. Start the Cognos 8 service.

Change the Suppression Functionality in Analysis Studio

Cognos 8.0 uses totals-based suppression to remove rows or columns throughout the analysis where the total result is a null or zero value. This approach has several limitations. For more information, see the Analysis Studio *User Guide*.

In Cognos 8.2, the default suppression functionality uses selection-based suppression. You can select a single row or column to remove rows or columns in the opposite axis of the crosstab that contain only empty cells.

However, you can change back to the original Cognos 8.0 functionality of totals-based suppression.

Steps

1. Go to the *c8_location*/configuration directory.

2. Locate the file named ansproperties.xml.sample, and rename it to ansproperties.xml.

3. Open the ansproperties.xml file, and locate the following code:

```
<structure>
 <!-- Enabling the 8.0 Zero Suppression feature will provide compatibility
for existing 8.0 customers -->
 <!-- Enabling the 8.0 feature will disable the new capabilities
provided in 8.2 and beyond -->
 <!-- The default is disabled.  0 == disabled (recommended).
1 == enabled. -->
 <!--<property>Enable8Dot0Suppression</property>
 <value type="long">0</value>-->
</structure>
```

4. Remove the comment tags (<!--) and (-->) from the `Enable8Dot0Suppression` property.

5. Change the value from 0 to 1.

6. Save the ansproperties.xml file.

7. Restart the Cognos 8 server.

Chapter 30: Troubleshooting Resources

Troubleshooting resources are sources of information that can help you resolve a problem that you are having with a product.

Generally, sources of troubleshooting information include logs, debugging modes, documentation, and technical support. In addition to this document, the following troubleshooting resources are available when you work with Cognos 8:

- error messages
- log files
- core dump files
- metric dump file
- Windows Event Viewer
- samples
- Knowledge Base
- Report Definition in Query Studio
- Cognos support
- Cognos diagnostic tools

By learning what troubleshooting resources are available, you are better able to resolve problems while using Cognos 8.

Error Messages

The first indication of a problem is often an error message. Error messages contain information that can be helpful in determining the cause of a problem.

You can click the Details link to see the full error message. The administrator can use this information, as well as other information about what product you are using and what you did before the error message appeared, to resolve an issue.

If you click OK in response to the error message, Cognos 8 undoes the last action and returns to the previous state.

Log Files

Log files can help you troubleshoot problems by recording the activities that take place when you work with a product. Operations performed in Cognos 8 are recorded in various log files for tracking

purposes. For example, if you experienced problems installing Cognos 8, consult the transfer log file to learn what activities the installation wizard performed while transferring files.

Before you begin viewing log files, ensure that they contain the information that you need. The number of log files and the information they contain are set by parameters in Cognos Connection and in Cognos Configuration.

Use Cognos Administration in Cognos Connection to learn about logging categories and how to set the level of detail to log for each category.

For more information, see the Cognos 8 *Administration and Security Guide*.

Use Cognos Configuration to specify the size, number, and location of log files, and to configure the properties of the log server. For more information, see the Cognos Configuration *User Guide*.

When troubleshooting, the following files can assist you:

The Transfer Log File

This file records the activities that the installation wizard performed while transferring files. The transfer log file is located in the *c8_location*\instlog directory. The file name identifies the product name, version, and build number, and includes a time stamp. The following is an example of the file name format:

tl-C8BISRVR-8.1-0.0-20050901_1122.txt

The Transfer Summary-Error Log File

This file records the components you installed, disk space information, the selections you made in the transfer dialogs, and any errors the installation wizard encountered while transferring components. The transfer summary-error log file is located in the *c8_location*/instlog directory. The file name identifies the product name, version, and build number, and includes a time stamp. The following is an example of the file name format:

tl-C8BISRVR-8.1-0.0-20050901_1122_summary_error.txt

The Startup Configuration File

This file records your configuration choices each time you save your property settings. The file name is cogstartup.xml. If you are unable to save your configuration, or are having problems you can revert to a previously saved configuration file. The backup configuration files are located in the *c8_location*/configuration directory. The following is an example of the file name format for backup configuration files:

cogstartup_200211231540.xml

The Startup Configuration Lock File

This file is created each time you open Cognos Configuration. It prevents you from opening more than one Cognos Configuration window. If you experience problems opening Cognos Configuration, you can check the *c8_location*/configuration directory for the cogstartup.lock file. If the file exists and Cognos Configuration is not open, it means that Cognos Configuration did not shut down properly the last time you used it. You can delete the lock file and then open Cognos Configuration.

The Locale Configuration File

This file records the configuration choices you make in Cognos Configuration for product and content locales, locale mapping, and currency support. If you experience problems with language support in the user interface or in reports, use these files to track your changes. The backup configuration files are located in the *c8_location*/configuration directory. The following is an example of the file name format:

coglocale_200211231540.xml

The Run-Time Log File

The default Cognos log file named cogserver.log file, or other log files that you configure to receive log messages from the log server, record information after you start the Cognos 8 service. They are located in the *c8_location*/logs directory. If you configured another destination for log messages, check the appropriate file or database.

Some log messages indicate problems. Most messages provide information only, but others can help you to diagnose problems in your run-time environment.

The Gateway Log File

The gateways record errors in the gateway log file, which is located in the *c8_location*/logs directory. You can use the gateway log file to troubleshoot problems that prevent the gateway from processing requests or from using encryption. Symptoms of these problems are user IDs and passwords do not work, single signon does not work, and the dispatcher is running but users receive the following error message: `The Cognos BI server is not available`. The gateway log file uses the following naming format, where *gateway_interface* is cgi, mod (Apache 1.3 module), mod2 (Apache 2.0 module), or isapi.

gw*gateway_interface*.log (e.g., gwcgi.log)

The Uninstallation Log File

This file records the activities that the Uninstall wizard performed while uninstalling files. The log file is named cognos_uninst_log.htm and is located in the Temp directory. You can use the log file to troubleshoot problems related to uninstalling Cognos 8 components.

The Silent Mode Log File

This file records the activities that Cognos Configuration performed while running in silent mode. This log file is named cogconfig_response.csv and is located in the *c8_location*/logs directory.

The ReportNet(R) to Cognos 8 Upgrade File

This file contains a summary of the results of an upgrade from ReportNet to Cognos 8. The log file is named upgradeLog.xml and is located in the *c8_location*/logs directory. The file is in xml format and references an xslt style sheet. You can double-click the file to have it appear in your browser.

Core Dump Files

If you receive an error message about the report server not responding, Cognos 8 wrote a core dump (.dmp) file to the file system. Core dump files indicate a serious problem with the program, such as an unhandled exception or a Cognos 8 process that terminated abnormally. Core dump files create a complete memory dump of the current state of the program when the problem occurs. The core file usually indicates a bug that requires a software fix.

If you see the report server not responding message, immediately check the \bin directory of the Cognos 8 server installation for any core dump files. In Windows, these files are named *processID*.dmp, such as BIBusTKServerMain_seh_3524_3208.dmp. In UNIX, the files are named core. In Linux, the files are named core.*processID*.These binary files must be viewed with a debugging program such as dbx, GNU debugger, or the WinDbg debugger for Windows.

If your server administrator cannot solve the problem, contact Cognos Customer Support and provide them with a test case, if possible, and the core files.

Core files can be 300 MB or more, and a new one of the same size is created each time that the problem occurs. In Windows, the files should be checked and cleaned regularly, during regular server maintenance. In UNIX and Linux, system settings can control how and when the core file is written to the file system when a process abnormally terminates.

In Windows, you can use a configuration file to turn off the creation of .dmp files. In a production environment, you can then enable core dumps when you encounter problems. Because not all problems are easy to reproduce, core file creation should be enabled in your testing and development environment so that you can use them.

With some Cognos 8 hotsite builds, core dump files are automatically created. The configuration file that controls this setting is different for Cognos 8.1 MR1 (p. 496) and later versions of the product (p. 496). During an upgrade, configuration settings are not overwritten.

Steps to Turn Off Core File Creation for Cognos 8.1 MR1

1. On the server where Cognos 8 is installed, open the rsvpproperties.xml file from the *c8_location*\configuration directory.
2. Change the `Win32StructuredExceptionHandling` property to 0 (zero) so that it reads

   ```
   <property>Win32StructuredExceptionHandling</property>
   <value type="long">0</value>
   ```
3. Save the file.

Steps to Turn Off Core File Creation for Cognos 8.1 MR2 and Later Versions

1. On the server where Cognos 8 is installed, open the cclWin32SEHConfig.xml file from the *c8_location*\configuration directory.
2. In the configuration element, change the value of the environment variable setting to 0 (zero) so that it reads

   ```
   <env_var name="CCL_HWE_ABORT" value="0"/>
   ```
3. Save the file.

Metric Dump File

You may have troubleshooting situations where further detail is required about the state of the system at a particular time. You may also want to track system trends over a given period for historical purposes.

The metric dump file records a snapshot of the current system metrics. The file is named metricdump.xml and is located in the *c8_location*/logs directory. By default, metric dumping is disabled. You can enable the feature by adding an advanced setting in Cognos Administration that specifies the location of the dispatcher. After the feature is enabled, you can keep it inactive by renaming the metric dump configuration file (which would hide the file) and then reactivate metric dumping for a particular event by renaming the configuration file back to the original name. For example, in Event Studio, you can monitor threshold violations and then trigger metric dumping using a simple file name change.

You can also edit the configuration file for metric dumping and change settings for resources to be tracked and the size and location of the output.

Steps to Enable Metric Dumping in Cognos Administration

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Configuration** tab, click **Dispatchers and Services**.
4. Click the set properties button .
5. Click the **Settings** tab.
6. For the **Environment** category, in the **Name** column, next to **Advanced settings**, in the **Value** column, click **Edit**.
7. In the **Set advanced settings** page, in the **Parameter** column, type the following advanced setting:

   DISP.MetricDumpEnabled

   Note that the setting name is case sensitive.
8. In the **Value** column, type the URL of the dispatcher, and click **OK** twice.

   Tip: You can also delete this setting. To do this, click the check box next to the setting, click **Delete**, and click **OK** twice.

Steps to Change Settings for Metric Dumping

1. Open the file *c8_location*\configuration\metricdumpconfiguration.xml in an editor.
2. To configure the resources for which metrics are to be logged, specify the resource in the following section:

```
<mbeans>
  <mbean>com.cognos:type=Metrics,*</mbean>
  <mbean>com.cognos:type=MetricHealth,*</mbean>
  <mbean>com.cognos:type=ServiceHealth,*</mbean>
```

```
  <mbean>com.cognos:type=ServiceOperationalStatus,*</mbean>
</mbeans>
```

For example, to specify a service

```
<mbean>com.cognos:type=Metrics,service=contentManagerService</mbean>
```

3. To change the file name and path, edit the following line:
   `<filename>../logs/metricdump.xml</filename>`
4. To change the time interval for dumping, in milliseconds, edit the following line:
   `<interval>15000</interval>`
5. To change the maximum number of dumps, edit the following line:
   `<count>-1</count>`

   where -1 is unlimited
6. To change the maximum file size before rollover, edit the following line:
   `<filesize>10000000</filesize>`
7. To change the number of metric dump files to keep, edit the following line:
   `<rollover>1</rollover>`
8. Save the changes.

Windows Event Viewer

Windows Event Viewer provides information about program, security, and system events. For example, if a Cognos 8 service fails to start, this fact is recorded in the event log.

Windows Event Viewer does not record information that is specific to operations or tasks performed in Cognos 8. Consult the Cognos 8 log files for these problems.

For information about how to use Windows Event Viewer, see the Windows help.

Samples

Cognos 8 uses samples to highlight product features and to help you learn how to use the product. You can also use samples to troubleshoot problems.

You can use the samples that come with Cognos 8 to determine if various components are working together as expected. For example, if you are having a problem running a report, you can try running a sample report to see if problem persists. You may discover that the problem is related to connecting to a database.

For information about setting up samples, see the Cognos 8 *Administration and Security Guide*.

Example - Testing Report Studio

You are a database administrator responsible for troubleshooting problems that report authors encounter when designing reports. Report Studio is now installed, and you want to ensure that it is working properly before the author begins using it.

To test Report Studio, you open and run one of the reports in the Report Samples folder in Report Studio.

If the report opens successfully, it appears in Report Studio, and the GO Sales and Retailers model associated with the report is loaded. When you run the report, Cognos Viewer appears, and the report contains data.

Use Knowledge Base

Knowledge Base is a database of documents maintained by Cognos support containing problems logged by customers. Consequently, a problem you are experiencing with Cognos 8 may already be reported by someone else, and a solution already found.

If Knowledge Base does not include the problem you are having, you can call Cognos support for individual assistance.

Before you can access Knowledge Base, you must have a valid logon. To obtain one, send an email message to SupportWeb@Cognos.com.

Steps

1. In your Web browser, go to

   (http://support.cognos.com/kb-app/knowledgebase)

2. In the **Enter Network Password** dialog box, type your user name and password, and click **OK**.

   The **Advanced Search** page appears.

3. Search through the available documents.

View the Report Definition in Query Studio

You can use the **Report Definition** command on the **Manage File** menu or the **Query Information** command in the **Report Definition** box to troubleshoot problems with your reports. The **Report Definition** command shows the expression for each report item. The **Query Information** command shows the query information for each report item.

Note: You cannot change the report properties using these commands.

Steps

1. In Query Studio, open the report that you want.

2. From the **Manage File** menu, click **Report Definition**.

   The **Report Properties** dialog box appears. It contains a table that lists every filter, report item, and corresponding expression in the report.

   Tip: Click **Query Information** to bring up a text box containing information about the query.

Call Cognos Support

If you are unable to resolve a problem using all other troubleshooting resources call Cognos support to receive immediate help. For information about Cognos support locations and programs, see the Cognos Global Customer Services web site (http://support.cognos.com).

To contact Cognos support, you must have a current support agreement with Cognos.

Before you call, do the following:

- Ensure that the problem is related to Cognos software and results in a Cognos error message.
- Attempt to reproduce the problem to ensure that it is not just a simple error.
- Check obvious things like file locations, directories, paths, and access.
- Review all relevant documentation, including any release notes or readme files.
- Check to see if any recent changes in your computing environment may be responsible for the problem.

Tip: You can also use the Cognos diagnostic tools.

Steps

1. Have the following information at hand:
   - your customer identification number
   - your case reference number, if it is an ongoing case
   - the phone number where you can be reached
   - the version of the software you use
   - the version of the operating environment you use
   - a description of what you were doing when the problem occurred
   - the exact wording of any error messages that appear
   - any steps you took to attempt to solve the problem
2. Contact the Cognos support center nearest you.

   You are asked whether this is a new or ongoing case. If it is an ongoing case, provide your case reference number or, if appropriate, your customer identification number.

   If you don't have support on the software about which you are calling, you will be directed to a support renewal representative.

Cognos Diagnostic Tools

Cognos Support provides diagnostic tools to help you:

- verify your environment
- identify and troubleshoot issues
- supply the details and systems information needed to log a case with Cognos support

The diagnostic tools were developed in Java. Each contains a JAR file, a batch file, and a PDF that explains what the diagnostic tool does and the results you can expect. Cognos diagnostic tools are read-only and do not make changes to your environment or to your Cognos products.

Cognos continually develops new diagnostic tools. To check for the most recent updates, as well as for more information about Cognos diagnostic tools, see the Cognos Global Customer Services web site (http://support.cognos.com/en/support/diagnostics/index.html).

Chapter 31: Problems Using Documentation

The topics in this section provide solutions for problems you may encounter when using the Cognos 8 documentation.

Problems When Printing a PDF Manual

You print a document in PDF format, but the print job is incomplete. For example, the job stops printing when it reaches a particular graphic.This is an Adobe Acrobat Reader issue that can occur when printing some PDFs using some versions of Acrobat Reader and some printer models. The same PDF may print correctly under one or both of the following conditions:

- using a different version of Acrobat Reader
- using a different printer

If you print from an Acrobat 4.0 or later product, you can try the following solution.

Steps to Force a Page to Print as an Image

1. In Acrobat Reader, from the **File** menu, click **Print**.
2. In the **Printer** section, select the **Print as image** check box.

   Because files print more slowly using this option, make sure you specify only the nonprinting page.
3. In the **Print Range** section, click **Pages from** and **Pages to**, type only the page number of the nonprinting page, and then click **OK**.

   You can print the rest of the PDF by resending the job starting on the next page.
4. Clear the **Print as image** check box.
5. In the **Print Range** section, click **Pages from** and **Pages to**, type the page range for the remaining pages, and then click **OK**.

   Although you can use the **Print as image** option to print the file, this setting does not resolve the original printing problem. For more information, see the Adobe Web site.

Unable to Launch a Web Browser When Accessing Help

You are running Cognos Connection on a Linux computer. You click Help and the following message appears:

Unable to launch a web browser

Attempting to execute 'netscape-remote openURL

Ensure that the web browser is defined in the path

This error occurs if the Netscape browser is not installed on the computer or the browser path is not set correctly.

The solution is to either install Netscape if it is not installed, or add a BrowserPath entry to the file cogconfig.prefs. The entry must specify the full path for the browser.

Text Does Not Appear Properly in Quick Tours

If your computer uses large fonts, you may not see all the text or text may not wrap properly in the Cognos 8 quick tours.

To fix this problem, do one of the following:

- Use small fonts for your computer.
- Use the smallest font setting in your Web browser.

Chapter 32: Installation and Configuration Problems

You may encounter problems during installation and configuration, or when setting up Cognos 8 to run within an application server.

Problems Starting Cognos 8

You may encounter problems when you try

- to start the Cognos 8 service
- to open the Welcome page for Cognos Connection for the first time
- to start an application server, such as WebLogic or WebSphere

Symptoms	Solution
You do not see the splash screen for Cognos Connection when you start Cognos 8.	Check your Web server configuration.
The service starts but no tables are created in the content store database.	Check your content store configuration.
The service does not start.	Ensure that you wait a few moments before submitting a request.
The third-party application server does not start.	Check the file permissions and directory names of the application server installation location.

Ensure that you use third-party software that is supported by Cognos components. You can view an up-to-date list of environments, such as operating systems, patches, browsers, Web servers, directory servers, and database servers on the Cognos Global Customer Services Web site (http://support.cognos.com).

CFG-ERR-0106 Error When Starting the Cognos 8 Service in Cognos Configuration

When you start the Cognos 8 service, you may receive the following error message:

CFG-ERR-0106 Cognos Configuration received no response from the Cognos 8 service in the allotted time. Check that Cognos 8 service is available and properly configured.

There are two possible causes for this problem:

- The Cognos 8 service needs more time to start.
- A standby Content Manager computer may be configured incorrectly.

The Cognos 8 Service Needs More Time

By default, Cognos Configuration checks the progress of the start request every half second for three minutes. If Cognos Configuration does not receive a response within this time, the error message appears.

To avoid this error, you can change the amount of time that Cognos Configuration waits to receive a response from the Cognos 8 service. You do this by configuring the ServiceWaitInterval and ServiceMaxTries properties in the *c8_location*/configuration/cogconfig.prefs file.

The ServiceWaitInterval property represents the time interval, in milliseconds, at which Cognos Configuration checks the progress of the start request. By default, its value is 500, which is equivalent to half a second.

The ServiceMaxTries property represents the number of times that Cognos Configuration checks the progress of the start request. By default, its value is 360.

Content Manager Is Configured Incorrectly

If the error message appears on a standby Content Manager computer, the setting for storing the symmetric keys may be incorrect.

To avoid this problem, configure the standby Content Manager computer to store the symmetric keys locally.

Steps to Change the Wait Time

1. Using Cognos Configuration, stop the Cognos 8 service.
2. Open the *c8_location*/configuration/cogconfig.prefs file in an editor.

   This file is created automatically the first time you open Cognos Configuration.
3. Add the following code to the file:

   ServiceWaitInterval=*number of milliseconds*

   ServiceMaxTries=*number of times*

   Tip: Add the numeric values that correspond to your configuration needs.
4. Save the file.
5. Using Cognos Configuration, start the Cognos 8 service.

Steps to Store Symmetric Keys Locally

1. On the standby Content Manager computer, start Cognos Configuration.
2. In the **Explorer** window, under **Security**, click **Cryptography**.
3. In the **Properties** window, under **CSK settings**, set **Store symmetric key locally** to **True**.

4. From the **File** menu, click **Save**.
5. From the **Actions** menu, click **Start**.

   This action starts all installed services that are not running. If you want to start a particular service, select the service node in the **Explorer** window and then click **Start** from the **Actions** menu.

Unable to Start the Cognos 8 Service Because the Port is Used by Another Process

You may not be able to start the Cognos 8 service or process if one of the default ports is used by another process.

Tip: To view the current network TCP/IP network connections, use the netstat command.

Use Cognos Configuration to change the default port that Cognos 8 uses.

When you change the port used by the local dispatcher, you must change the value of the Dispatcher URI properties. Because the change affects all the URIs that are based on the local dispatcher, you must change the URIs of all local components. By default, local components contain localhost in the URI.

For example, if you install all components on one computer and you want to change the dispatcher port, replace 9300 in all dispatcher and Content Manager URIs with the new port number.

Steps to Change the Default Port

1. Start Cognos Configuration.
2. In the **Explorer** window, click the appropriate group or component:
   - To access the port number in the dispatcher and Content Manager URIs, click **Environment**.
   - To access the port number for the local log server, under **Environment**, click **Logging**.
   - To access the shutdown port number, under **Environment**, click **Cognos 8 service**, **Cognos 8**.
   - To access the port number for the location of the applications.xml file used by Portal Services, under **Environment**, click **Portal Services**.
3. In the **Properties** window, click the **Value** box next to the property that you want to change.
4. Change the value from 9300 to the new value.

   Ensure that you change the ports in all URIs that contain localhost:9300.
5. From the **File** menu, click **Save**.
6. From the **Action** menu, click **Start**.

Cognos 8 Service Does Not Start or Fails After Starting

You start the Cognos 8 service but services either do not start correctly or are very slow to start. After services start, the system fails a short time afterwards. While services are starting, Java uses 100 percent of the CPU time. You may also receive multiple occurrences of error messages such as the following:

- *DPR-DPR-1035 Dispatcher detected an error.*
- *CAM-CRP-1157 Unable to synchronize the local common symmetric key store with Content Manager.*

If you use a DB2 database for the content store, ensure that the database version and Java version are compatible. For DB2 version 8.2, Java 1.5 is not supported. For DB2 version 9, Java 1.5 is supported on all operating systems except HPUX and Solaris.

To review an up-to-date list of environments supported by Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

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Cognos 8 Server Fails to Start and Gives No Error Message

A Cognos 8 server may fail to start after an upgrade or new installation, but no error message appears. This may occur when a previously running or new Cognos 8 server is configured to use a large amount of memory.

If the server on which Cognos 8 is installed contains version 1.0 of Microsoft security update 921883, there may be an issue when a lot of contiguous memory is requested by an application.

This is a known issue with version 1.0 of Microsoft security patch 921883. Microsoft distributed a second version of the patch to fix the problem. As a workaround, uninstall the first security patch, or install version 2.0 of the patch. Alternatively, you can configure the Cognos 8 server to use less memory.

For more information, see the Microsoft knowledge base article about programs using a lot of contiguous memory failing, at http://support.microsoft.com.

Cognos BI Server Not Available When Starting Cognos 8

After you configure Cognos components and start the Cognos 8 services, when you open Cognos Connection, the following error message may appear:

The Cognos Gateway is unable to connect to the Cognos BI server.

The server may be unavailable, or the gateway may not be correctly configured.

Check the Cognos server log file for more information. By default, the cogserver.log file is located in the *c8_location*/logs directory. If you configured another destination for log messages, check the appropriate file or database.

Content Manager may not be able to connect to the content store if the content store is not configured properly. This may occur if

- the content store uses an unsupported character encoding
- the content store uses a database collation sequence that is case sensitive
- the configuration settings you specified in Cognos Configuration are not valid

Unsupported Character Encoding

If the following messages appear in the log file, the database you created for the content store does not use a supported character encoding:

- For Oracle:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-SYS-5121 Content Manager cannot start because the database character set for the content store is not supported.

  CM-SYS-5126 The content store database server uses the character set US7ASCII.

  CM-SYS-5125 The content store database client uses the character set US7ASCII.

- For DB2 UDB:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-SYS-5121 Content Manager cannot start because the database character set for the content store is not supported.

  CM-SYS-5124 The content store database server uses the code page 1252.

- For Sybase:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-SYS-5121 Content Manager cannot start because the database character set for the content store is not supported.

For Content Manager to connect to the content store, the content store must use the appropriate character encoding.

Database	Character encoding
Oracle 9i	AL32UTF8 AL32UTF16
DB2 UDB	Codeset UTF-8
Sybase ASE	UTF-8

Database	Character encoding
Microsoft SQL Server	UTF8 UTF16

To resolve this problem, you must recreate the content store database using the correct character encoding, or convert the character encoding. For more information, see the database vendor documentation.

Case Sensitive Collation Sequence

If the following messages appear in the log file, the database you created for the content store uses a database collation sequence that is case sensitive:

CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

CM-SYS-5122 The content store database has a default collation that is case-sensitive. Content Manager requires a content store that has a case-insensitive collation.

CM-SYS-5123 The content store database server uses the collation <parameter>.

CM-SYS-5007 Content Manager build @cm_build_version@ failed to start! Review the Content Manager log files and then contact your system administrator or customer support.

To resolve this problem, you must recreate the content store database using a database collation sequence that is not case sensitive. For more information, see the database vendor documentation.

Invalid Configuration Settings

If the following or similar messages appear in the log file, you did not configure the content store correctly in Cognos Configuration.

- For Microsoft SQL Server:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-CFG-5036 Content Manager failed to connect to the content store. The connection string is "jdbc:JSQLConnect://localhost:1433/cm".

  Failed Logon:com.jnetdirect.jsql.x: Cannot open database requested in login 'cm'. Login fails. url:jdbc:JSQLConnect://localhost:1433/cm.

- For DB2:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-SYS-5003 Content Manager is unable to access the content store. Verify your database connection parameters and then contact your database administrator.

  [IBM][CLI Driver] SQL1013N The database alias name or database name "CM123" could not be found.

- For Oracle:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-CFG-5036 Content Manager failed to connect to the content store. The connection string is "jdbc:oracle:thin:@localhost:1521:pb1".

  ORA-01017: invalid username/password; logon denied.

- For Sybase:

  CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

  CM-CFG-5036 Content Manager failed to connect to the content store. The connection string is "jdbc:sybase:Tds:localhost:5000/cm".

  JZ006: Caught IOException: java.net.ConnectException: Connection refused: connect.

If you are using an Oracle database, do not use illegal characters such as an underscore in Cognos Configuration for the Service Name property. If the Service Name includes illegal characters, tables are not created in the content store database when the Cognos 8 service is started.

Steps for Microsoft SQL Server, Oracle, DB2, and Sybase

1. On the computer where you installed Content Manager, start Cognos Configuration.
2. In the **Explorer** window, under **Data Access**, **Content Manager**, right-click **Content Store** and click **Delete**.

   This deletes the default resource. Content Manager must be configured to access only one content store.
3. Right-click **Content Manager**, and then click **New resource**, **Database**.
4. In the **Name** box, type a name for the resource.
5. In the **Type** box, select the type of database and click **OK**.

   If you are upgrading and want to use an existing content store, ensure that you select the type of database you use for the older version of ReportNet.

   If you installed more than one version of Cognos 8, you must use a different content store for each version. When a content store is used by a new version of Cognos 8, it cannot be used by an older version of ReportNet.

   Tip: If you want to use Oracle Net8 keyword-value pair to manage the database connection, select **Oracle database (Advanced)**.
6. In the **Properties** window, provide values depending on your database type:
   - If you use a Microsoft SQL Server database, type the appropriate values for the **Database server with port number or instance name** and **Database name** properties.

For a Microsoft SQL Server database, you can choose to use a port number, such as 1433, or a named instance as the value for the **Database server with port number or instance name** property.

To connect to a named instance, you must specify the instance name as a JDBC URL property or a data source property. For example, you can type **localhost\instance1**. If no instance name property is specified, a connection to the default instance is created.

Note that the properties specified for the named instance, along with the user ID and password, and database name, are used to create a JDBC URL. Here is an example:

jdbc:JSQLConnect://localhost\\instance1/user=sa/*more properties as required*

- If you use a DB2 database, for the **Database name** property, type the database alias.
- If you use an Oracle database, type the appropriate values for the **Database server and port number** and **Service name** properties.
- If you use an advanced Oracle database, for the **Database specifier** property, type the Oracle Net8 keyword-value pair for the connection.

  Here is an example:

  (description=(address=(host=myhost)(protocol=tcp)(port=1521)(connect_data=(sid=(orcl)))))
- If you use a Sybase database, type the appropriate values for the **Database server and port number** and **Database name** properties.

7. If you want to change the logon credentials, specify a user ID and password:
   - Click the **Value** box next to the **User ID and password** property and then click the edit button when it appears.
   - Type the appropriate values and click **OK**.
8. From the **File** menu, click **Save**.

   The logon credentials are immediately encrypted.
9. Test the connection between Content Manager and the content store.

   Tip: In the **Explorer** window, right-click the new database and click **Test**.

   Content Manager connects to the database, checks the database permissions, and creates and populates a table. The table is not deleted and is used each time that the test is repeated.

Cannot Log On to a Namespace When Using Cognos Connection (PRS-CSE-1255 Error)

You open Cognos 8 through Cognos Connection. However, when you attempt to create a data source and log on to a namespace, the following error messages appear:

- *PRS-CSE-1255 Exception error encountered in data decryption.*

- *CAM-CRP-1064 Unable to process the PKCS #7 data because of an internal error. Reason: java.lang.IndexOutOfBoundsException.*

This issue may occur if you do not have the necessary permissions for the following directories:

- c8\configuration
- c8\configuration\csk
- c8\configuration\encryptkeypair
- c8\configuration\signkeypair

The solution is to enable the read and execute permissions on the directories listed above for anyone who must start the Cognos 8 service.

Cognos 8 Services Fail to Restart After a Network Outage

The Cognos Bootstrap Service restarts Cognos 8 services after a network outage for Tomcat installations where a network IP address is specified in the internal dispatcher URI. During the restart, The Cognos 8 services may not initialize successfully, requiring a manual restart after the network is restored.

To resolve the problem, configure the **Internal dispatcher URI** property in Cognos Configuration to use localhost or the network host name.

No Warning That Installing a Later Version of Cognos 8 Will Automatically Update the Earlier Version of the Content Store

You have a version of ReportNet installed on your computer. You install a later version into a new location. You use the same database for the content store for both versions. After you configure the later version and start the Cognos 8 service, the earlier version of ReportNet no longer works because all content is automatically upgraded.

If you want to use different versions of ReportNet and Cognos 8 after you upgrade, ensure that before you install the later version, you

- back up the database you use for the content store
- restore the backup to a new location

Alternatively, you can choose to use the deployment tool to import the entire content store from an earlier version to the later version. All existing content in the content store database is replaced by the imported content. You receive a warning message about this.

Download of Resource Fails

You start Report Studio in Internet Explorer and the following error message appears:

The download of the specified resource has failed.

This problem may be caused by recent Microsoft XMLHTTP upgrades if you do not have a language preference set in Internet Explorer.

To resolve the problem, specify a language preference in Internet Explorer.

DB2 Returns SQL1224N Error When Connecting from AIX

If your content store is a DB2 database and you receive an SQL1224N error on AIX, check the db2diag.log file for additional information about the error.

If the error includes reason code 18, you may need to change the DB2 configuration to accept more connections. For more information, see the IBM DB2 support pages for the error SQL1224N.

Content Manager Error When Starting Cognos 8

After starting Cognos 8, no BIBUSTKSERVMA process is started. There are errors listed in the pogo******.log and cogserver.log files. Users receive errors in the browser when connecting to Cognos Connection.

In the pogo******.log file, an error related to Content Manager appears.

In the cogserver.log file, the following error appears:

An attempt to register the dispatcher in Content Manager was unsuccessful. Will retry periodically.

When connecting to http://*computer name*/cognos8, the following error messages appear in the browser:

- *DPR-ERR-2058 The dispatcher cannot service the request at this time. The dispatcher is still initializing*
- *SoapSocketException: Connection Refused*

Cognos Configuration uses a user ID to bind to the LDAP database. If this user ID is moved to another group, Cognos Configuration can no longer locate it.

To correct the problem, move the user ID back to the original group.

Cannot Open an MS Cube or PowerCube

You are unable to open an MS Cube or PowerCube, or you can open an MS Cube but only metadata is shown. For an MS Cube, you may receive the following error message:

MO-ERR-0030

"Cannot connect to the datasource. Please set the service to run as a domain user with the correct privileges."

To solve this problem, ensure that the user running the Cognos 8 service has access rights to the cube.

PowerCubes are accessed through mapped drives or UNC path names.

Steps for MS Cubes

1. Add the domain user account that starts the Cognos 8 service to the **Act as part of the operating system** privilege:
   - Under Administrative Tools, select **Local Security Policy**.

- Expand **Security Settings, Local Policies** and click **User Rights Assignment**.
- Right-click the **Act as part of the operating system** policy and select **Properties**.
- Click **Add User or Group** and add the user account that starts the Cognos 8 service.

2. If you use the domain userID and password method of authentication, add the user account that starts the Cognos 8 service to the domain that includes Content Manager, the report server (Application Tier Components), IIS Web server, and the data source server (Microsoft SQL Server or Microsoft Analysis Server).
3. If you use an external namespace, such as Active Directory Server, for authentication, add the user account that starts the Cognos 8 service to the domain that includes the authentication provider.

   This domain must also include Content Manager, the report server (Application Tier Components), IIS Web server, and the data source server (Microsoft SQL Server or Microsoft Analysis Server).

   For more information about configuring external namespaces for authentication, see the topics about authentication providers in the *Installation and Configuration Guide*.

Step for PowerCubes

- Ensure that the Cognos user profile has sufficient operating system or domain access rights to open the PowerCube file.

  For information, see the *Administration and Security Guide*.

Cannot Open an OLAP Data Source

You cannot open one of the following data sources:

- MSAS
- Essbase
- DB2

You can try opening the same cube with Excel. This will tell you whether the OLAP server is configured and running, and whether the appropriate client software is installed.

The Page Cannot Be Found When Starting Cognos 8 in Windows 2003

After installing Cognos 8 on Windows 2003, the following message may appear when you try to start Cognos 8:

The page cannot be found. The page you are looking for might have been removed, had its name changed, or is temporarily unavailable. HTTP Error 404 - File or Directory not found.

This error is caused by a security feature in Windows 2003 Internet Information Services (IIS). This security feature does not allow unknown cgi file extensions.

To resolve this problem, add a new file extension in IIS for the cognos.cgi file. For more information, see the IIS documentation.

The Page Is Not Shown When Opening a Portal After Installing Cognos 8

After you install and configure Cognos 8, you are unable to open Cognos Connection.

This may be because the Web server is not properly configured. For example, the virtual directories required for Cognos 8 may not exist or they may point to the wrong physical folders.

For information about configuring the Web server, see the *Installation and Configuration Guide*.

DPR-ERR-2058 Error Appears in Web Browser When Starting Cognos 8

After you start the services in Cognos Configuration and then try to open the portal, a message similar to one of the following may appear:

DPR-ERR-2058 The dispatcher encountered an error while servicing a request. XTS handler must be initialized before being invoked.

DPR-ERR-2058 The dispatcher cannot service the request at this time. The dispatcher is still initializing. Please try again or contact your administrator.

These error messages usually occur when the dispatcher cannot communicate with Content Manager. To help you determine the specific cause, look in the cogserver.log file in the *c8_location*/logs directory. The most common causes are listed below, with solutions.

Cognos Services are Not Done Initializing

After you start the services in Cognos Configuration and the configuration tool shows that the services are running, wait a few minutes for all services to start before you open the portal.

Content Manager is Not Available

In a distributed installation, ensure that Content Manager is installed, configured, and running. Ensure also that the other Cognos computers are configured with the correct Content Manager URI.

The Content Store is Not Available or is Not Configured Properly

Ensure that the content store database was created and that you configured it correctly in Cognos Configuration.

Tables are Not Created in the Content Store

Ensure that you are using a version of DB2, Microsoft SQL Server, Oracle, or Sybase that is supported by Cognos components.

The Logon Credentials for the Content Store Are Incorrect

Check whether the information changed. For example, DB2 reads information from the NT user management. If the password for the NT account changed, you must also change the logon credentials for the content store in Cognos Configuration.

Check for special characters in the logon password. Occasionally, the JDBC driver does not accept characters that are reserved for xml, such as %, !, <, and >.

The User Does not Have Appropriate Permissions

Ensure that the user has the appropriate permissions.

Out of Memory on HP-UX

If you are using Tomcat, you can determine the issue is related to HP-UX server configuration. You may be exceeding the expected maximum number of simultaneously active threads per process.

Steps to Check for an HP-UX Configuration Problem

1. In the /bin/startup.sh file, find

   ../tomcat4.1.27/bin/catalina.sh start "$@"

2. Change it to the following:

   ../tomcat4.1.27/bin/catalina.sh run "$@"

   The run command causes the Tomcat output to appear in the console window for Cognos 8.

3. Stop and restart Cognos 8 using the ./shutdown.sh and ./startup.sh commands.

   If the following error message appears in the console window for any of the application servers, the issue is an HP-UX configuration problem:

   OutofMemoryException error: Unable to create new native thread on HP-UX.

   The problem is that the default values for HP-UX 11.0 and 11i are set too low for most Java applications.

   Tip: You can check the number of threads in your process by using the -eprof option available in JDK 1.1.8 and by analyzing the Java.eprof file using HPjmeter by selecting the threads metric.

Steps to Increase the maximum Number of Threads Per Process

1. Have your system administrator change the Kernel parameter as follows:
   - max_thread_proc = 512
   - nkthread = 1024
2. Ensure that the ulimit settings are unlimited.

Content Manager Cannot Connect to the Content Store on Oracle

If you are using an Oracle database as a content store, the DPR-ERR-2058 error may be generated when logging onto the portal http://host_name/cognos8. All tables are created on the database.

You may also receive the following error messages:

- *CM-CFG-5036 Content Manager failed to connect to the content store.*
- *ORA-01017: invalid username/password; logon denied*

Steps to Set the Oracle Database Server Name

1. In the **Explorer** window, click **Data Access**, **Content Manager**, **Content Store**.
2. Change the Oracle database server name to a fully qualified name such as host_name.companyname:1534 to match the name in the tnsnames.ora file.

EBA-090034 Error When Starting WebLogic 8

After configuring WebLogic 8 to use SSL, you used the command startManagedWebLogic.cmd to start the application server. The application server did not start and you received the following error message:

EBA-0990034 Not listening for SSL

The problem occurred because WebLogic 8 has a feature that is incompatible with the Cognos 8 bcprov-jdk14.134.jar file.

To resolve the problem, you must add a new version of the BouncyCastle bcprov .jar file to the WebLogic Java extension directory.

Steps

1. From the BouncyCastle Web site, http://www.bouncycastle.org/download/, download a compatible BouncyCastle bcprov .jar file, such as bcprov-jdk14-137.jar.
2. Copy the downloaded .jar file to the WebLogic Java extension directory, *WebLogic_location*\jdk142_*nn*\jre\lib\ext.
3. In the *WebLogic_location*\jdk142_*nn*\jre\lib\security directory, edit the java.security file and add the following line to the provider list:

   ```
   security.provider.6=org.bouncycastle.jce.provider.BouncyCastleProvider
   ```

Report Studio Does Not Start

You may not be able to start Report Studio if you are using pop-up blocking software on your computer.

When you start Report Studio, it opens in a new browser window. In addition, a new browser window opens when you run a report and when an error is detected.

To correct the problem, disable any pop-up blocking software when working in Report Studio.

DPR-ERR-2022 Error Appears in Web Browser When Starting Cognos 8

After you start the services in Cognos Configuration and then try to open the portal, a message similar to the following may appear:

DPR-ERR-2022 No response generated. This may be due to an incorrect configuration, a damaged installation, or the dispatcher not having finished initializing.

Opening the Portal Too Soon

This problem can occur if you try to open the portal before Cognos services are initialized.

To avoid this problem, after you start the services in Cognos Configuration and the configuration tool shows that the services are running, wait a few minutes for all services to start before you open the portal.

The system.xml File Contains Errors

The system.xml file may have been edited.

Replace the system.xml file in the *c8_location*\templates\ps\portal directory with a copy from backup or use an XML editor to edit it.

Unable to Download the cognos.xts File

After installing Cognos 8, you are prompted to download the cognos.xts file when opening Cognos Connection. The following error message may appear:

You have chosen to download a file from this location. cognos.xts from servername

This problem occurs when the permissions on the virtual directories are not set properly. You must provide the cgi-bin virtual directory in the Microsoft Internet Information Service (IIS) with execute permissions.

To resolve this problem, recreate the virtual directories in IIS with the following permissions.

Alias	Path	Permissions
cognos8	*c8_location*\Program Files\Cognos\c8\webcontent	Read
cognos8\ cgi-bin	*c8_location*\Program Files\Cognos\c8\cgi-bin	Read Execute
cognos8\help	*c8_location*\Program Files\Cognos\c8\webcontent\documentation	Read

Application Server Startup Script Fails

You may have problems running the startup scripts for an application server to deploy the Cognos application if Cognos 8 components are installed in a directory with a name that includes spaces.

To resolve this problem, rename the directory and do not include spaces in the new name. If this solution is not easily handled by the startup scripts, try adding quotation marks around the directory name that includes spaces or use the 8.3 naming convention.

Deploying Cognos 8 to an Oracle Application Server or IBM WebSphere Application Server Fails

Deploying Cognos 8 to an Oracle application server or an IBM WebSphere application server may fail with any of the following errors:

- Browser timeout in administration console
- Error Message: HTTP 500 Internal Error
- Error Message: Deployment failed: Base Exception: java.rmi.RemoteException (Oracle)
- Return to application file selection page (IBM WebSphere)

These errors can occur because the application file that you are trying to deploy is too large.

To solve this problem, do the following:

- If you are using the **Build Application Wizard**, clear the **Include static files from the Webcontent folder** check box when you select the application to build.

  This will reduce the size of the application file. If static content is required, you can manually copy it to the deployed application location after you have successfully deployed Cognos 8 into the application server.

- If you are deploying the application file manually for an Oracle application server, type the following command:

  dcmctl deployapplication -f ***path_and_name_of_ear_file*** **-a** ***application_name*** **-co** ***OC4J_instance_name***

  This command is not supported for Oracle Release 3.

For more information about deploying Cognos 8 to an application server, see the *Installation and Configuration Guide*.

Microsoft Excel 2000 Multipage Report Type Does Not Work

To ensure that report URLs cannot be changed when passed from a client browser to the report server, Cognos 8 applies signatures to the URLs it generates. However, Excel 2000 multipage (XLS)

does not support signed URLs. To use the Excel 2000 multipage report type, you must disable digital signing of the URLs by doing the following:

Steps to Disable Signed URLs

1. Stop the dispatcher.
2. In the *c8_location*/configuration directory, rename the cafconfig.xml.sample file to cafconfig.xml.
3. Open the cafconfig.xml and find the following section:

```
<!--Should we reject unsigned requests for /gd/ urls.
(e.g. multipage excel reports)
Default: true-->
<crn:parameter name="caf_signedReportUrls">
<crn:value xsi:type="xsd:boolean">true</crn:value>
</crn:parameter>
```

4. Change `="xsd:boolean">true</crn:value>` to `="xsd:boolean">false</crn:value>`.
5. Restart your dispatcher.
6. Repeat the above steps for every dispatcher in your environment, or copy the cafconfig.xml to each *c8_location*/configuration directory and restart the dispatchers.

Unable to Deserialize Context Attribute Error When Deploying the p2pd.war File to WebLogic

When you deploy the p2pd.war file to WebLogic, you may see the following error:

Error [context]Could not deserialize context attribute

java.io.NotSerializableException: com.cognos.logserver.LogService

This error does not affect the deployment of the p2pd.war file.

To avoid this problem, add at least one language preference in Internet Explorer.

Error Appears After Upgrading Cognos 8 on a WebLogic Application Server

You are using WebLogic and upgrade Cognos 8 from an earlier release. After you deploy the p2pd.war file for the new installation, a message similar to the following may appear:

<BEA-101215> <Malformed Request "null". Request parsing failed, Code: -10>

This can occur if you undeploy Cognos 8 from WebLogic and some files from the earlier version are not removed from the system.

To solve this problem, use the administrative tools for your application server to ensure that Cognos 8 has been undeployed. For information about undeploying applications, see your application server documentation.

If the directory to which Cognos 8 was originally deployed is not removed during the undeploy process, delete the directory. Also, remove any Cognos 8 .jar files that are cached in your application

server environment. For example, in WebLogic 7.0, .jar files are sometimes left in %WL_HOME%\user_projects\<*domain-name*>\<*managed-server-name*>\.wlnotdelete\c8_p2pd_p2pd\jarfiles

You can remove them by deleting the WEB-INF directory.

In WebLogic 8.1.2, the cache location is %WL_HOME%\user_projects\domains\<*domain-name*>\<*managed-server-name*>\.wlnotdelete\extract\c8_p2pd_p2pd\jarfiles

After you remove all files from the previous installation, you can redeploy Cognos 8.

Chinese, Japanese, or Korean Characters Are Different After Upgrade

If you use Chinese, Japanese, or Korean characters, you may notice differences in some characters after upgrading to Cognos 8.

Examples

- You run an existing report. When you compare the output to the same report in ReportNet, you see that some of the characters are different.
- You do a search that you did in ReportNet and get different results.

The differences occurred because the conversion tables that are used for Chinese, Japanese, and Korean were modified to meet global standards. If your report specifications or search filters contain expressions that use constant values, the results may be affected.

If you want to use the same conversion table that you used in ReportNet, run the following script in the *c8_location*/bin directory:

- On UNIX, type

  conv_compat.sh
- On Linux, type

  conv_compat.sh
- On Windows, type

  conv_compat.cdm

Accented or Double-Byte Characters May Not Display Correctly When Installing Cognos 8 on Linux

If you are using issetup under a UTF-8 locale, accented or double-byte characters may not display correctly.

To resolve this problem when installing in German or French, use a non-UTF-8 locale and then launch issetup or use the character-mode program issetupcc to install Cognos 8.

To resolve this problem when installing in Japanese, use the character-mode program issetupcc and change the encoding setting of X Terminal to Shift-JIS, then install Cognos 8.

Problems Configuring Cognos 8

After you install Cognos 8 components, you may encounter problems when you save changes in Cognos Configuration.

Ensure that you

- configure and start the services on the computer where Content Manager is located before you configure other components
- restart the Cognos 8 service after you make any configuration changes

Run Database Cleanup Scripts

In some troubleshooting situations, you may be advised to start with new configuration data.

You can run an SQL script to delete all the tables in any of the following databases that Cognos 8 components use:

- content store for data that Cognos 8 needs to operate
- delivery database for report notifications
- log database for log messages
- metric store for metric package content and Metric Studio user preferences

When you delete a table, its structural definition and data are deleted permanently from the database. For the metric store, database objects may also be deleted.

When you restart the Cognos 8 service, a new set of required database tables are created automatically in the location specified by your configuration settings.

Steps

1. On each computer where Content Manager is located, stop the Cognos 8 service.
2. Go to the appropriate directory:
   - To delete tables from the log database, go to *c8_location*\configuration\schemas\logging.
   - To delete tables from the content store, go to *c8_location*\configuration\schemas\content.
   - To delete tables from the notification database, go to *c8_location*\configuration\schemas\delivery.
   - To delete tables from the metric store, go to *c8_location*\configuration\schemas\cmm.
3. Go to the appropriate database directory.
4. Depending on the database and database type, run one of the following scripts in the appropriate database tool to delete the tables.

Database	Database Type	Script Name
Content store	DB2	dbClean_db2.sql
	Derby	dbClean_derby.sql
	Microsoft SQL Server	dbClean_mssqlserver.sql
	Oracle	dbClean_oracle.sql
	Sybase	dbClean_sybase.sql
Notification	DB2	NC_DROP_DB2.sql
	Derby	NC_DROP_Derby.sql
	Microsoft SQL Server	NC_DROP_MS.sql
	Oracle	NC_DROP_ORA.sql
	Sybase	NC_DROP_SYBASE.sql
Log	DB2	LS_dbClean_db2.sql
	Derby	LS_dbClean_derby.sql
	Microsoft SQL Server	LS_dbClean_mssql.sql
	Oracle	LS_dbClean_oracle.sql
	Sybase	LS_dbClean_sybase.sql
Metric store	DB2	cmm_purge_deleted_data *dbalias username password* Specify the dbalias only if a database with the same name is already cataloged.
	Microsoft SQL	cmm_purge_deleted_data *metric_store_name database_name Admin_user_name password*

Database	Database Type	Script Name
	Oracle	cmm_purge_deleted_data *database_name database_user_name password* Replace *database_name* with the name in the tnsnames.ora file that refers to the database SID for Metric Studio

5. Start the Cognos 8 service.

Error Trying to Encrypt Information When Saving Your Configuration

When you save your configuration using the configuration tool, you may see an error message that the cryptographic information cannot be encrypted. An error occurred when requesting a certificate from the Certificate Authority.

The cryptographic information cannot be encrypted. Do you want to save the configuration in plain text?

Before you can encrypt your configuration settings, the computer where Content Manager is installed must be configured and running. On UNIX, ensure that you copied the appropriate .jar files to the installation location of your Java Runtime Environment. In addition, ensure that your Java environment is configured correctly, the URIs are correct, and the same certificate authority password is configured for all Content Manager computers.

On Linux, ensure that you copied the appropriate .jar files to the installation location of your Java Runtime Environment.

Also, an error message similar to the following may appear:

java.lang.NoClassDefFoundError: javax/net/ServerSocketFactory.

The cryptographic error usually means the Java environment is not configured correctly. Ensure that the JAVA_HOME environment variable is set correctly and the appropriate security providers are installed, such as JSSE for JRE 1.31.

Steps to Check the Configuration

1. On the Content Manager computer, start Cognos Configuration.
2. In the **Explorer** window, click **Environment**.
3. In the **Properties** window, verify these properties:
   - Under **Gateway Settings**, **Gateway URI**
   - Under **Dispatcher Settings**, **External dispatcher URI** and **Internal dispatcher URI**

- Under **Other URI Settings, Dispatcher URI for external applications** and **Content Manager URIs**

4. In the **Explorer** window, click **Security, Cryptography, Cognos**.
5. In the **Properties** window, under **Certificate Authority settings**, click the value for **Password**.

   Ensure that the same password is used on all Content Manager computers.
6. Save the configuration and restart Cognos 8.

Problems Generating Cryptographic Keys in Cognos Configuration

When you uninstall Cognos 8, some temporary folders are left behind. Reinstalling the product to the same location without first removing the temporary folders may cause problems while attempting to generate the cryptographic keys in Cognos Configuration.

To resolve this problem, uninstall Cognos 8, remove the *c8_location*/temp/cam folder, and install Cognos 8 again.

CAM-CRP-1315 Error When Saving Configuration

When you save your configuration, you may receive the following error message:

CAM-CRP-1315 Current configuration points to a different Trust Domain than originally configured.

This error occurs when there has been a change to your environment's trust domain. The trust domain is managed by the Certificate Authority associated with the content store. This error can occur if the content store you originally used has been removed or if you modified your configuration to use a Content Manager associated with a different content store after you have saved your original configuration.

To resolve the problem, change your configuration to use the original content store or regenerate the cryptographic keys.

Steps to Regenerate Cryptographic Keys

1. On the Content Manager computer, back up the existing cryptographic keys by saving the following directories to an alternate location that is secure:
   - *c8_location*/configuration/csk
   - *c8_location*/configuration/encryptkeypair
   - *c8_location*/configuration/signkeypair
2. Delete the csk, encryptkeypair, and signkeypair directories.
3. In Cognos Configuration, save the configuration and restart the services.
4. Repeat steps 1 to 3 on all computers that have Cognos 8 components installed.

Configuration Data is Locked by Another Instance of Cognos Configuration

You may get an error message that the configuration data is locked by another instance of Cognos Configuration.

When you start Cognos Configuration, it checks to see if the cogstartup.lock file exists in *c8_location*/configuration. The file may exist if a previous instance did not shut down properly or if another instance of Cognos Configuration is running.

If another instance of Cognos Configuration is running, you should exit that instance. Otherwise, any changes you make to the local configuration may result in errors.

If no other instance of Cognos Configuration is running, delete the cogstartup.lock file in *c8_location*/configuration.

If the Cognos8 service is stopped, click **Start**.

Unable to Exit a Tab Sequence When Using Keyboard-only Navigation in Cognos Configuration

If you use the Tab key to navigate in Cognos Configuration, you may experience problems exiting a tab sequence. For example, in the Properties window, you can press the Tab key to move from one property to another.

However, because Cognos Configuration is a Java application, when you want to close the Properties window, you must press Ctrl+Tab.

Unable to Save Your Configuration

You may be unable to save your configuration because you are missing a resource. For example, you delete a resource such as the Cognos namespace, a cryptographic provider, or the content store. You can replace the default database type for the content store with Oracle, DB2, or Sybase. You cannot replace the Cognos namespace. You can recreate it, but you must then recreate your Cognos groups and roles.

For more information about creating groups and roles in Cognos Connection, see the *Administration and Security Guide*.

Steps to Recreate the Cognos Namespace

1. Start Cognos Configuration.
2. In the **Explorer** window, under **Security**, right-click **Authentication** and then click **New resource**, **Namespace**.
3. In the **Name** box, type a name for the resource.
4. In the **Type** box, click **Cognos**, and then click **OK**.

   The Cognos namespace appears in the **Explorer** window.
5. From the **File** menu, click **Save**.

Java Error When Starting Cognos Configuration

When you start Cognos Configuration, you may receive an error message that the Java Runtime Environment (JRE) has changed and that the current cryptographic information is not compatible with the new JRE. You may then be prompted to regenerate the cryptographic information for the new JRE or exit to switch back to the previous JRE.

This error may occur for one of these reasons:

- Your configuration data was encrypted using a different JRE than the one Cognos 8 components are currently using.
- The cryptographic information may have been corrupted.

If you click **Regenerate** in the error dialog, the Cognos 8 service is stopped and the cryptographic information is regenerated.

If you click **Exit** in the error dialog, you must set the JAVA_HOME environment variable to point to the JRE that you used to save your configuration.

On Windows, if you want Cognos 8 components to use the JRE that is installed by default, unset JAVA_HOME or set JAVA_HOME to *c8_location*/bin/jre.

Note: If you want to change from one JRE to another, see the topic on changing the version of JVM that Cognos 8 components use. For more information, see the *Installation and Configuration Guide*.

Cryptographic Error When Starting Cognos Configuration

When you start Cognos Configuration, the following error message may appear:

The cryptographic information may have been corrupted or the cogstartup.xml file is invalid. You may have to fix this file or remove it from disk. For more information, see the Installation and Configuration Guide.

This error occurs when Cognos 8 components detect an error in the cogstartup.xml file. This can occur when the cogstartup.xml file is manually edited and there is an error in the changed text.

To resolve the problem, replace the cogstartup.xml file with a copy from your backup location.

Current Configuration Settings Are Not Applied to Your Computer

You change default property values or add a resource to your installation in Cognos Configuration. After saving the current configuration, you may not see the changes or be able to use the resource in the run-time environment.

To apply the new settings to your computer, you must restart the Cognos 8 service.

Steps to Restart the Cognos 8 Service

1. Start Cognos Configuration.
2. From the **Actions** menu, click the appropriate command:
   - If the Cognos 8 service is currently running, click **Restart**.

This action starts all installed services that are not running and restarts services that are running. If you want to restart a particular service, select the service node in the **Explorer** window and then click **Restart** from the **Actions** menu.

- If the Cognos 8 service is stopped, click **Start**.

  This action starts all installed services that are not running. If you want to start a particular service, select the service node in the **Explorer** window and then click **Start** from the **Actions** menu.

CM-CFG-029 Error When Trying to Save a Configuration That Specifies a SQL Server Data Source

In Cognos Configuration, you try to save a configuration and the following error message appears in the cogserver.log file:

CM-CFG-029 Content Manager is unable to determine whether the content store is initialized.

EXECUTE permission is denied on object "sp_tables", database "master", owner "dbo'.

This indicates that you do not have the correct permissions to initialize a content store or create a table in the database.

The solution is to ensure that the content store user has permissions to use the sp_tables stored procedure in the master database.

Users are Prompted for Active Directory Credentials

The single signon mechanism does not work when Cognos 8 is configured as follows:

- Microsoft Internet Explorer runs on a Windows NT computer.
- The authentication namespace is configured with the Active Directory provider.
- Microsoft Internet Explorer on a Windows 2000 or Windows 2003 server is configured for Integrated Windows Authentication.

As a result, users are prompted for their Active Directory credentials.

This problem occurs because the Cognos 8 Active Directory provider uses ADSI protocol and Kerberos delegation for authentication in a single signon environment. When Microsoft Internet Explorer runs on Windows NT, it cannot authenticate to the IIS server using Kerberos delegation.

When your system is configured for Windows Integrated Authentication, for the single signon to work with IIS, you must

- configure Cognos 8 to communicate with the Active Directory server using the LDAP provider.
- configure the external identity mapping property to read the REMOTE_USER environment variable.

Font on UNIX Not Found When Starting Cognos Configuration

When you start Cognos Configuration, the following error message may appear:

Font specified in font.properties not found...

This is a common problem on UNIX. It means that the Java Virtual Machine (JVM) is trying to use one or more fonts that are not installed on your computer. However, the JVM should use the system default, and Cognos Configuration should start and run normally.

To avoid these errors, add the missing fonts to your Java Runtime Environment by editing the font.properties files. Several font.properties files, which contain standard font environment information, are installed with your Java SDK. You can find these files in the *JRE_location*/lib directory.

For more information, see the Java documentation.

Unable to Load DB2 OLAP Library in Framework Manager

You installed the DB2 OLAP 8.1 client and cannot load the DB2 OLAP library into Framework Manager. You receive the following message:

DB2-ERR-0028 Unable to load the following DB2 OLAP library: "C:\ibm\db2olap\bin\essapin.dll"

Cognos 8 is configured to use the DB2 OLAP library for Version 8.2. To resolve this problem, you must edit the qfs_config.xml file and rename the library for Version 8.1.

Steps

1. In the *c8_location*\configuration directory, edit the qfs_config.xml file.
2. Find the following code:

   ```
   <provider name="DB2OlapODP" libraryName="doodp82" connectionCode="DO"/>
   ```

3. Change the library name from doodp82 to doodp81 and save the changes.

Group Membership is Missing From Active Directory Namespace

If an Active Directory namespace is configured for the same forest and a user is authenticated using a credential, the group membership will be missing.

The process identity of Cognos 8, when running as a local system account or a domain user, must have one of these privileges:

- impersonate a client after authentication
- act as part of the operating system

If the privilege is missing, there is no group membership for the authenticated user.

To solve this problem, perform the following steps.

Steps

1. From the **Start** menu, click **Settings**, **Control Panel**.

2. Click **Administrative Tools**, and then double-click **Local Security Policy**.
3. In the console tree, click **Security Settings**, **Local Policies**.
4. Click **User Rights Assignment**.
5. Add the process identity of Cognos 8 to one of the following policies:
   - Impersonate a client after authentication

     The default is Administrators, Service.

     For more information, see http://technet2.microsoft.com/WindowsServer/en/Library/fe1fb475-4bc8-484b-9828-a096262b54ca1033.mspx
   - Act as part of the operating system

     The default is Local system.

     For more information, see http://technet2.microsoft.com/WindowsServer/en/Library/ec4fd2bf-8f91-4122-8968-2213f96a95dc1033.mspx

   Both of these privileges give an account the ability to act as another user.

   The privilege Impersonate a client after authentication is similar to the Act as part of the operating system privilege except that it will only allow a process to impersonate after authentication, whereas the privilege Act as part of the operating system allows a process to impersonate before authentication.

   For more information, see http://www.microsoft.com/technet/prodtechnol/windowsserver2003/technologies/security/tkerbdel.mspx

Deploying Cognos 8 to an Oracle Application Server or IBM WebSphere Application Server

You are deploying Cognos 8 to an Oracle application server or an IBM WebSphere application server and you receive the following errors:

- *Browser timeout in administration console*
- *Error Message: HTTP 500 Internal Error*
- *Error Message: Deployment failed: Base Exception: java.rmi.RemoteException* (Oracle)
- *Return to application file selection page* (IBM WebSphere)

This error can occur because the application file that you are trying to deploy is too large.

To solve this problem, on an Oracle application server, you can deploy the application file manually using the following command:

dcmctl deployapplication -f <*path and name of ear file*> -a <*application name*> -co <*OC4J instance name*>

For either IBM WebSphere or Oracle application servers, clear the **Include static files from the Webcontent folder** option when you use the **Build Application Wizard**. Not including the static

content will reduce the size of the application file. If static content is required, you can manually copy it to the deployed application location after you have successfully deployed Cognos 8 into the application server.For more information about deploying Cognos 8 to an application server, see the *Installation and Configuration Guide*.

Errors Displayed Deploying to Oracle 10G Application Server

You are deploying Cognos 8 to an Oracle 10G Application Server, and get the following error messages:

CMM-APP-3254 The initialization of the metrics store failed. DIS-ERR-3115 Task execution failed.

MDS-RUN-3213 Unable to locate database bulk load utility. Please install the appropriate database tool for this platform ('bcp' for SQL Server, 'sqlldr' for Oracle)

This occurs because the bulk loading utilities (SQL Loader on Oracle) are not included in the deployment file created by Cognos Configuration.

To resolve this error, you must use the Oracle client software on the computer where you installed the Oracle 10G Application Server to install the missing components. Ensure that you install SQL Loader.

Page Cannot be Found Error Running Reports using Cognos 8 Go! Office

In a Microsoft Office document configured for Cognos 8 Go! Office, you use Run Report but receive a "The page cannot be found" error message.

This can occur if the Cognos 8 gateway and dispatcher use "localhost" as the server name values on the Cognos 8 server.

To correct this, use the computer name for the gateway and dispatcher host values instead of "localhost".

Error Initializing Oracle Content Store After Upgrade from ReportNet

You are creating a content store in Oracle or upgrading a ReportNet content store in Oracle to Cognos 8, and you receive the following error message:

Content Manager can not initialise the content store with the assistance of the initialisation file: dbupgrade2_0021-to-2_0022_oracle.sql ORA-22858 invalid alteration of datatype

This error occurs if the Oracle database compatibility level is set lower than 9.0.1.

You can correct this by changing the compatibility level to 9.0.1 or higher and restarting the Oracle instance.

CGI Timeout Error While Connected to Cognos 8 Components Through a Web Browser

When performing operations through your Web browser, you receive the following error message:

CGI Timeout, process will be deleted from server.

The error occurs when you use Windows Internet Information Services (IIS) as your Web server and the gateway is configured to use CGI. IIS has a default timeout for CGI applications.

To resolve this problem, you can configure the gateway to use ISAPI. IIS does not have a default timeout for ISAPI applications. Or, if you want to keep using a CGI gateway, you can increase the CGI timeout in IIS.

Steps to Change the Gateway to ISAPI

1. On the gateway computer, start Cognos Configuration.
2. Under **Environment**, for the **Gateway URI** property, change the cognos.cgi portion of the URI to

   cognosisapi.dll
3. In your Web browser, specify the ISAPI URI:

   http://*computer_name*/cognos8/isapi

Steps to Increase the CGI Timeout

1. In the Windows administrative tools, open Internet Information Services.
2. Under the local computer node, right-click **Websites** and select **Properties**.
3. In the **Home Directory** tab, click **Configuration**.
4. In the **Process Options** tab, increase the CGI script timeout.

Servlet Class Fails to Load in WebLogic

You may have problems when configuring a distributed server installation and using WebLogic as the application server for Cognos 8.

When deploying the p2pd.war for the Application Tier Components computer, you may receive servlet exceptions and the dispatcher does not start. The cogserver.log is also not created.

The following error messages appear in the WebLogic Server console:

<Jul 9, 2004 3:47:37 PM EDT> <Error> <HTTP><BEA-101249> <[ServletContext (id=19023494,name=p2pd,context-path=/p2pd)]:Servlet class com.cognos.pogo.isolation. ServletWrapper for servletcfgss could not be loaded because the requested class was not found in the classpath /host2/bea812/user_projects/domains/c8/applications/p2pd/WEB-INF/classes. java. lang.ClassNotFoundException: com.cognos.pogo.isolation.ServletWrapper.>

<Jul 9, 2004 3:47:37 PM EDT> <Error> <HTTP> <BEA-101216> <Servlet: "cfgss" failed to preload on startup in Web application: "p2pd".

javax.servlet.ServletException: [HTTP:101249][ServletContext (id=19023494,name=p2pd,context-path=/p2pd)]: Servlet class com.cognos.pogo.isolation. ServletWrapperfor servlet cfgss could not be loaded because the requested class was not found in the classpath /host2/bea812/user_projects/domains/c8/applications/p2pd/WEB-INF/classes.java.

lang.ClassNotFoundException: com.cognos.pogo.isolation.ServletWrapper. at weblogic.servlet. internal.ServletStubImpl.prepareServlet (ServletStubImpl.java:799)

at weblogic.servlet.internal.WebAppServletContext.preload Servlet(WebAppServletContext.java: 3252)

To avoid this problem, do not deploy the p2pd application from the WebLogic applications directory. Create the p2pd directory in another location and deploy p2pd from there.

Steps

1. Open Cognos Configuration and configure the Application Tier Components computer.
2. Restart the Content Manager computer.
3. Create a p2pd directory in a location that is accessible by the WebLogic server but is not in the WebLogic applications directory.

   For example, create a directory named p2pd in the following location:

   WebLogic_location/user_projects/*domain_name*
4. Create the p2pd.war file.
5. In the p2pd directory, extract the p2pd.war file to the WebLogic installation using the following command:

   %JAVA_HOME%/bin/jar xvfm "c8_location/p2pd.war" .
6. Start WebLogic.
7. In the WebLogic Server Console, deploy the p2pd application.

Desktop Icons or Cognos Configuration Window Flicker on Windows

When you run Cognos Configuration on Windows, you may notice that the desktop icons or the Cognos Configuration window flickers.

To resolve this issue, start Cognos Configuration using the -noddraw command line option.

Chapter 33: Security Problems

You may encounter problems when using Cognos Connection to administer security in Cognos 8.

For information about using Cognos Connection, see the Cognos Connection *User Guide*. For information about security administration, see the *Administration and Security Guide*.

Problems Setting Up Security

The topics in this section document problems you may encounter when setting up security.

Access to Entries is Denied During Deployment

If you deploy data using the Reports Administrator role, access to security entries may be denied. By default, the Reports Administrator role does not have write access to the Cognos namespace.

Before you deploy, modify the permissions of this role to ensure that it has read and write permissions to the Cognos namespace.

Prompt to Change Passwords When Logging On to an Active Directory Security Source

When logging on to Cognos 8 using a Microsoft Active Directory security source, the submitted password is recognized as expired and you are prompted to change it. This occurs even if the password should still be valid. If the password is successfully changed, the behavior still occurs.

The following error message appears:

Your password has expired. Please change it. Please type your credentials for authentication.

The solution is to set up the authority for delegated administration for Cognos 8. Ensure that the server name or named account for starting the Cognos 8 service is set up in the Active Directory properties as an authority for delegated administration. Without these permissions, Cognos 8 is unable to read all user properties from the Active Directory server.

For more information, see the Active Directory documentation.

Unable to Log On

If Cognos 8 uses an Active Directory Server as the security provider, you may not be able to log on using only your user ID. One of the following errors may appear:

Your password has expired. Please change it.

The provided credentials are invalid.

This problem occurs when the Content Manager service runs under the local system account and runs on a computer that is not part of the Active Directory Server domain.

To log on, you must qualify your user ID using the domain name. For example, when you log on, type

domain\user ID

If you still cannot log on, contact your Cognos 8 security administrator.

Certificate Authority Error When Logging On to Cognos Connection

You attempt to log on, entering a valid user ID and Password, to Cognos Connection in an environment that uses the default Cognos Cryptographic Provider settings. However, the following error message appears:

CAM-CRP-1071 Unable to process a remote request for the common symmetric key.

The certificate with the DN 'C=CA,O=Cognos,CN=CAMUSER' issued by the Certificate Authority with the DN 'C=CA,O=Cognos,CN=CA' is not trusted.

Reason: Exception thrown while doing CertPath validation

Cause:certificate expired on yyymmddhhmmGMT+00:00

This problem occurs when the certificate issued by the Certificate Authority (CA) has expired. You can renew the certificate by saving the configuration in Cognos Configuration on the computer where Content Manager is installed and then restarting the Cognos 8 service.

Entries Do Not Appear in Cognos Connection for a Member of a Newly Created Group

A user who is a member of a newly created group, which is itself a member of the Query Users group, logs on to Cognos Connection. The user sees that some entries, such as My Folders, are missing. The user name may also be missing from the upper-left corner of the page.

The namespace that the user belongs to must have traverse rights to the Query Users group.

Steps to Add Traverse Permission

1. Log on to Cognos Connection as a system administrator.
2. Click **Directory**.
3. Click **Set Properties** next to the namespace.
4. Click the **Permissions** tab.
5. If it is not already there, add the Query Users group to the namespace.
6. Click the check box for Query Users and ensure that **Traverse** permission is granted.
7. Click **Apply**, and click **OK**.
8. Test with a user.

Problems Logging On to Cognos Portlets

There are several reasons why users with valid portal user IDs and passwords may not be able to log on to Cognos Portlets.

For information about configuring single signon between Cognos 8, Portal Services, and your portal, see the Cognos 8 *Installation and Configuration Guide*.

Anonymous Access

If Cognos 8 is configured to allow anonymous access, all portlet users are logged on as anonymous.

Multiple Namespaces

If Cognos 8 is configured to use more than one authentication namespace, you must install a separate Cognos 8 gateway and configure it to use the namespace for portal users.

You must also change the CPS connection point in the Cognos portlets:

- For IBM Websphere, change the CPS Endpoint parameter in the portlet application.
- For SAP EP, change the _cpsserver: CPS Connection Server field in each iView.

SAP Enterprise Portal Using the SAP Logon Ticket Method

If you use the SAP Enterprise Portal and the SAP logon ticket method to enable single signon, ensure that the following is true:

- Cognos 8 is configured to use an SAP BW authentication namespace.
- A proper trust relationship is established between the SAP portal and the SAP BW back end.

SAP Enterprise Portal Using the User Mapping Method

If you use the SAP Enterprise Portal and use the user mapping method to enable single signon, ensure that the following is true:

- A data source was created in the SAP Enterprise Portal, and it refers to the same Cognos 8 URL as in the iViews.
- The iView generating the error is associated with the Cognos 8 data source in the portal.
- The user entered valid Cognos 8 credentials in the portal.

These settings are located under user mappings in the personalize portal settings.

- The user name and password are registered in the namespace used by Cognos 8.
- The Cognos 8 URL entry point is secured in Cognos 8.

Create a secure URL to access the dispatcher servlet or servlet gateway.

IBM WebSphere Portal

If you use the IBM Websphere portal, ensure that the following is true.

- The credentials for the portal user are available in the Cognos 8 authentication namespace.
- The server running the portal and the server running Cognos 8 are both configured to use the IBM WebSphere Application server.
- Both application servers are configured for single signon using one of the supported Active Credentials objects: HttpBasicAuth, LtpaToken, SiteMinderToken, or WebSealToken.
- The selected Active Credentials method is indicated in the parameters for the Cognos portlet application.
- If using Ltpa token as an Active Credentials object, the Cognos 8 URL entry point is secured in Cognos 8.

Create a secure URL to access the dispatcher servlet or servlet gateway.

Authentication Problems Using Third-party Providers

The topics in this section document problems you may encounter when using a third-party authentication provider.

CAM-AAA-0096 Unable to Authenticate User When Using a Cognos Series 7 Namespace

When you try to log on in Cognos 8 using a user account that is deleted from all user classes in Access Manager, you receive the following error message:

CAM-AAA-0096 Unable to authenticate because the account can not be accessed.

The scenario is as follows:

- You create a new user in Cognos Series 7 Access Manager and assign them to a user class.
- You log on to Cognos 8 as Administrator and assign the same Series7 user to a Cognos 8 role, such as authors.
- You log off Cognos 8 and log on again as the new Series7 user.
- In Access Manager, you remove that user from the user class so that the user is not in any user classes.
- In Cognos 8, when you try to log on as the user, you get the error message.

If you configured a Cognos Series 7 namespace for use with Cognos 8, but a user in that namespace is not a member of at least one Access Manager user class, you cannot log on as that user in Cognos 8.

To correct the problem, add the user to at least one user class in Access Manager.

Expired Password Error Appears When Using Active Directory Server

You use Active Directory Server as an authentication provider. When you log on to Cognos 8, you see the following error message:

Your password has expired. Please change it. Please type your credentials for authentication.

Ensure that you set up the authority for delegated administration for Cognos 8. The server name or named account for starting the Cognos 8 service must be set up in the Active Directory Server as an authority for delegated administration. Cognos 8 can then read all user properties from the Active Directory server. For more information, see the Active Directory Server documentation.

Single Signon Is Not Working When Using Active Directory Server

You use Active Directory Server as an authentication provider and single signon is not working.

To ensure that users are not prompted to log on to Cognos 8, the following must be true:

- Active Directory is running in native mode.
- The user does not have the **Account is sensitive and cannot be delegated** attribute selected.
- For each IIS Web server
  - This computer is part of the Active Directory domain.
  - If the process is running as a Local System Account, the **Trust computer for delegation attribute** is selected.
  - If the process is running as a Domain User Account, the **Account is trusted for delegation** attribute is selected.
- For each ReportNet Content Manager server
  - This computer is part of the Active Directory domain
  - If the process is running as a Local System Account, the **Trust computer for delegation** attribute is selected
  - If the process is running as a domain User Account, the **Account is trusted for delegation** attribute is selected.
- Kerberos authentication must be the active WWW-authentication header.

Note: Kerberos will not work in an Internet zone.

Unable to Authenticate User for Cognos Portlets

When you attempt to access Cognos portlets through your portal, you may see the following error message:

Failed to process the request.

CPS-CCM-1200 The WSRP operation "getMarkup" failed.

CPS-WSF-2000 Authentication failed.

CAM-AAA-0055 User input is required. CAM-AAA-0036 Unable to authenticate because the credentials are invalid.

A more detailed description of the error that occurred can be found in the log.

This message indicates that Portal Services is unable to authenticate the current portal user with Cognos 8. For information about how to configure single signon between Cognos 8, Portal Services, and your portal, see the Cognos 8 *Installation and Configuration Guide*.

Unable to Identify SAP Permissions Required

You may encounter errors using SAP BW because your SAP user signon does not have sufficient permissions. To identify the permissions needed, use the ST01 transaction.

Steps

1. In SAP R/3, type /ST01 in the command window.
2. Under **Trace components**, select **Authorization check**.
3. Select **Change trace**.
4. In the **Options for Trace Analysis Field**, under **General Restrictions**, enter the user name of the Cognos account you are tracing.

Unable to Access Cognos Administration When an NTLM Namespace Is Used and Single Signon Is Enabled

When you are logged into Cognos 8 using an NTLM namespace and single signon is enabled for your system, a Cognos Application Firewall (CAF) error may occur when you try to access Cognos Administration.

To avoid this problem, resolve any possible issues related to the gateway host name. You can either ensure that the gateway host name matches the gateway host or you can add the name of the gateway server to the list of valid domains and hosts.

Steps to Match the Gateway Host Name

1. Open Cognos Configuration.
2. In the **Explorer** window, click **Environment**.
3. In the **Properties** window, under **Gateway Settings**, ensure that **Gateway URI** specifies the correct server name or IP address and not 'localhost'.

   Tip: We recommend that all URI properties specify a server name or IP address and not 'localhost'.

4. Save the configuration.

Steps to Add the Gateway Server as a Valid Host

1. Open Cognos Configuration.
2. In the **Explorer** window, under **Security**, click **Cognos Application Firewall**.
3. In the **Properties** window, click the **Value** column for **Valid domains or hosts** and then click the edit button.
4. Click **Add**.
5. Type the name of the gateway server in the blank row and then click **OK**.

   For more information about valid domains, see the *Installation and Configuration Guide*.
6. Save the configuration.
7. Restart the Cognos 8 service.

Chapter 34: Report and Server Administration Problems

You may encounter problems when using Cognos Connection to administer Cognos 8.

For information about using Cognos Connection, see the Cognos Connection *User Guide*. For information about administration, including setting up sample report projects and models, see the *Administration and Security Guide*.

Database Connection Problems

Each data source can contain one or more physical connections to databases. The topics in this section document problems you may encounter when setting up a database connection.

Unable to Select ODBC as the Type of Data Source Connection

Because Cognos 8 on UNIX does not support all ODBC drivers, when you create data source connections to IBM Red Brick, Microsoft SQL Server, or NCR Teradata databases, you cannot select ODBC as the type of data source connection. To create an ODBC connection to these database vendors, select Other Type instead.

For the following database vendors, add the associated database codes when you type the connection string.

Database vendor	Database code
IBM Red Brick	RB
Microsoft SQL Server	SS
NCR Teradata	TD

Type the data source connection, as follows:

[^UserID:[^?Password:]];LOCAL;{RBSSTD};DSN=Data_Source[; UID=%s[;PWD=%s]][@ASYNC={01}][@Connection_Timeout/Reply_Timeout][@COLSEQ=[Collation_Sequence]]

The following are examples of connection strings:

- ^UserID:^?Password:;LOCAL;RB;DSN=DB62SALES;UID=%s;PWD=%s@ASYNC=0
- ;LOCAL;SS;DSN=TESTSERVER

To create data source connections to Microsoft SQL Server from UNIX, you must use the DataDirect ODBC driver for SQL Server.

For more information, see the *Administration and Security Guide*.

Cannot Connect to a SQL Server Database Using an OLE DB Connection

You cannot create a native connection to a Microsoft SQL Server using OLE DB in Cognos Connection. The following error messages appear:

QE-DEF-0285 Logon failure

QE-DEF-0325 The cause of the logon failure is:

QE-DEF-0068 Unable to connect to at least one database during a multi-database attach to 1 database(s) in: testDataSourceConnection

UDA-SQL-0031 Unable to access the "testDataSourceConnection" database

UDA-SQL-0107 A general exception has occurred during the operation "{0}"

UDA-SQL-0208 There was an error initializing "MSDA" for OLEDB

The solution is to ensure that MDAC version 2.71 or higher is installed. The registry of the local system should hold the MDAC version information.

Intermittent Problems Connecting to a SQL Server Database

You use SQL Server database as a reporting data source. You test the same database connection several times in Cognos Connection. Sometimes the test succeeds, but other times you see one of the following or a similar error message:

SQL Server cannot be found.

Access denied.

In addition, when you run reports, sometimes they run but other times you see the following or a similar error message:

Connection not found - Check DNS entry or select different connection.

You may also have problems creating the database that is used for the content store.

These errors can occur if you configure named pipes instead of TCP/IP protocol as the default network library in the SQL Server Client Network Utility for a SQL Server reporting or content store database.

Cannot Access Cognos Series 7 Reports from Cognos Connection

After modifying Cognos 8 to use a Cognos Series 7 namespace and modifying the system.xml file, the Upfront content is not available in the Public Folder area and the personal content is not available in the My Folder area.

The solution is to ensure that the value for the <!-- character encoding used by series7 --> entry uses the series7_character_encoding value. This value can be obtained from the Cognos Series 7 Cognos

Configuration Manager. The value can be shown in the **Explorer** pane by clicking **Locale** under **Cognos Shared**.

Steps to Modify the Character Encoding Used by Cognos Series 7

1. Open the system.xml file located in the <*installation drive*>:\Program Files\cognos\c8\templates\ps directory.
2. Modify the <!-- Series 7 Integration parameters -->

   <param name="series7">

   <enabled>true</enabled>

   <!-- character encoding used by series7 -->

   <encoding>windows-1252</encoding>

   <!-- host and port to connect to Upfront server -->

   <host>wottcumarasr2k1</host>

   <port>8030</port>

   <!-- Upfront gateway location -->

   <gateway>/cognos/cgi-bin/upfcgi.exe</gateway>

   <!-- prefix for Cognos 8 back URLs when linking to series 7 content. (e.g., http://Cognos 8 computer) -->

   <back-prefix>http://wottcumarasr2k1</back-prefix>

   </param>

Series 7 Namespaces Do Not Initialize When Services are Started

To address an issue related to Series 7 namespaces, a new setting called Series7NamespacesAreUnicode has been added to Cognos Configuration. This setting instructs the Cognos 8 Series 7 provider to enable UTF-8 processing on the namespace data. UTF-8 processing is only available with Series 7 namespaces of version 16.0 and above. For other versions, the behavior and actions are as follows:

- In a multi-code page environment, do not disable the setting or the server may fail. If the system finds a Series 7 version 15.2 namespace and the Series7NamespacesAreUnicode setting is enabled, Cognos 8 reverts to disabled behavior. If you have a mixed namespace environment, that is, a directory server with both version 15.2 and version 16.0 namespaces, the version 15.2 namespace may not initialize. In this case, you must disable the Series7NamespacesAreUnicode setting.

Content Manager Connection Problem in Oracle (Error CM-CFG-5036)

Starting the Cognos 8 Service does not create the tables in an Oracle Content Manager. One of the following error messages is generated:

CM-CFG-5063 A Content Manager configuration error was detected while connecting to the content store.

CM-CFG-5036 Content Manager failed to connect to the content store.

CM-SYS-5007 Content Manager failed to start. Review the Content Manager log files and then contact your system administrator or customer support.

When you create a new database in Oracle, the SID name that is created has no underscore in it. You must use this SID with no underscore as the Service Name in Cognos Configuration.

Steps to Configure the Oracle Content Manager

1. Ensure that you can contact the Oracle instance through "tnsping <SID>" where the <SID> does not contain an underscore.
2. Configure the Oracle Content Manager connection in Cognos Configuration so that the Service Name is the same as the <SID> in step 1.

Cannot Connect to an OLAP Data Source

You cannot connect to an OLAP source (such as SAP BW, Essbase, or DB2 OLAP)

Confirm the following:

- You can open the OLAP server from Microsoft Excel. Most OLAP vendors have a plug-in which allows connectivity through Excel.
- You have the correct client software installed on the relevant Cognos 8 servers. Any Cognos 8 computer which retrieves data from the OLAP source must have the appropriate client software.
- For MSAS, check that Pivot Table service is installed and the correct service pack is applied.
- You can open the OLAP source through Cognos Series 7.
- You can open either the OLAP vendor samples or the Cognos samples. The problem may be specific to one model, outline, or cube.
- The user making the request from Cognos 8 is a Domain user with the appropriate access rights.

Other Administration Problems

The topics in this section document problems you may encounter when administering Cognos 8.

Restarting Servers After Solving Content Store Problems

If the content store becomes unavailable, after resolving the problem, you must stop and restart Cognos 8 services to resume processing.

For information about stopping and starting Cognos 8 services, see the *Cognos Configuration User Guide*.

An Update or Delete Request Fails

When any property of an object changes, the version property associated with the object changes. If you try to update or delete an object, the request fails if the value of the version property changed after you retrieved the object from the data store.

For example, if two administrators read the properties of the same object at the same time, they both have the same version of the object. If they both try to update, the first update request succeeds. However, the second update request fails because the version of the object no longer matches the version retrieved from the data store.

If this happens when you submit an update request, you must read the data again to get the current version of the object and then resubmit your update request.

BI Bus Server Processes Remain in Memory After a Shutdown

On rare occasions, the processes for the BI Bus server, BIBusTKServerMain, may stay in memory after you perform a normal shutdown. If this occurs, terminate the processes manually.

Steps to Terminate Processes in Windows

1. In the **Windows Task Manager** dialog box, click the **Processes** tab.
2. Click the **BIBusTKServerMain** processes.
3. Click **End Process**.

Steps to Terminate Processes in UNIX

1. Use the `ps` command to find the orphan processes.

   For example, type

   ps -ef grep | BIBus

2. Use the `kill -9` command to terminate the processes.

   For example, type

   kill -9 [BIBus process-id]

Higher Logging Levels Negatively Affect Performance

All the Cognos 8 services send events to the log server, which directs messages to a log file. After an error or problem occurs, you can review the log messages to obtain clues as to what happened. Log messages also provide the status of components and a high-level view of important events, such as successful completions and fatal errors.

In the server administration tool, five levels of logging are available. They range from minimal, which logs the least amount of detail and is intended for less frequent events, to full, which logs more detail and is intended for more frequent events and detailed troubleshooting purposes.

Increasing the logging level may negatively affect the performance of Cognos 8. The higher the level of detail logged, the more resources that are used. If performance is slow, you can try lowering the logging levels.

To access the server administration tool, you must have execute permissions for the Administration secured function.

Steps to Change Logging Levels

1. In Cognos Connection, click **Launch, Cognos Administration**.
2. On the **Configuration** tab, click **Dispatchers and Services**.
3. In the **Actions** column, click the set properties button for the dispatcher or configuration folder you want.
4. Click the **Settings** tab to view all the configuration settings.
5. In the **Value** column, click a new value for the following settings, each of which represents a logging category:
   - Audit logging level
   - Audit run-time usage logging level
   - Audit administration logging level
   - Audit other logging level

   Tip: If you want to reset a configuration setting to its default value, select its check box and click **Reset to parent value**.
6. Click **OK**.

Problems Accessing Cognos Portlets

When you attempt to access Cognos portlets through your portal, you may see an error message similar to one of the following:

Failed to process the request.

CPS-WSR-1042 Failed to send the request to target "http://MyServer:9300/p2pd/servlet/dispatch/cps2/nav".

Connection refused: connect

A more detailed description of the error that occurred can be found in the log.

Failed to process the request

CPS-CCM-1200 The WSRP operation "getMarkup" failed

CPS-WSF-2008 Normal execution of the operation failed

PRS-TPR-0352 Failed to open template file Failed to open template file "/cps2/portlets/nav2/navigator/getMarkup.xts"

A more detailed description of the error that occurred can be found in the log

Failed to process the request

CPS-WSR-1049 The request failed the server returned the HTTP error code "404" for the target "http://wottbouillom-2k:9300/p2pd/servlet/gateway/cps2/nav"

A more detailed description of the error that occurred can be found in the log

Failed to process the request

CPS-WSR-1043 Failed to read the response from target "http://sottcps3:9300/p2pd/servlet/dispatch/cps2/nav"

Stream closed

A more detailed description of the error that occurred can be found in the log

These messages indicate that there is a problem connecting to the Cognos 8 Server.

This problem can be caused by one of the following:

- The Cognos 8 server is not running or is still initializing.

  Ensure that the Cognos 8 Server is started properly, and test it by accessing Cognos Connection through a Web browser.

- The portal server does not have network access to Cognos 8 server.

  To test connectivity to the Cognos 8 server, use the portal server computer to ping the Cognos 8 server. Use the server name and address that appear in the error message. If the ping is successful, ensure that there is no firewall blocking the port used by Portal Services, which is 9300 by default.

- The URL for connecting to Cognos 8 is incorrect.

  For IBM Websphere, locate and modify the CPS Endpoint parameter in each portlet application as required.

  For SAP EP, locate and modify the _cpsserver: CPS Connection Server field in each iView as required.

- Java Virtual Machine conflicts exist on the Cognos 8 server.

  Cognos 8 includes a version of Java Runtime Environment (JRE). Ensure that no other version of the Java Virtual Machine or Java SDK are installed.

For information about configuring Cognos 8 to work with Portal Services, see the Cognos 8 *Installation and Configuration Guide*.

Unable to Edit Object Properties in a Plumtree 5.0 Portal

When you import the Portal Services package into a Plumtree 5.0 portal and try to edit the properties of Cognos objects, such as the remote server, or the portlets, an error may occur that indicates that certain property values are missing. As a result, you cannot apply your property changes.

The missing values refer to global Plumtree properties, such as URL, and can be used in searches for objects or documents. Because the global properties are not used by Portal Services, the Plumtree portlet package file CognosPlumtree5PortletPackageS81.pte does not include default values for them. If the Global Object Properties Map in the Plumtree portal has a property assigned to a

certain type of object, such as the remote server type, when you try to edit this type of Cognos object, you are prompted to specify a value for this property.

To solve this problem, you can perform one of the following tasks:

- Remove the problematic property from the Plumtree Global Object Properties Map.

Please note that changing the global property settings for one object may affect other objects.

- Specify any value, for example a space, for the problematic property.

The property is not used by Cognos portlets so the value is irrelevant.

Steps to Edit the Global Object Properties Map

1. In a Plumtree portal, click **Administration**.
2. In the **Select Utility** drop-down list, click **Global Object Property Map**.
3. For the Cognos object you want to edit, click the edit icon.
4. Clear the check box next to the property you want to remove.
5. Click **OK**.

Steps to Specify a Value for a Global Property

1. In a Plumtree portal, click **Administration**.
2. Locate the Cognos object whose properties you want to edit.
3. Click the object.
4. Under **Edit Standard Settings**, click **Properties and Names**.
5. Type any value for the property.
6. Click **Finish**.

Only the Administrator Can See Cognos Portlets

When using Portal Services with an IBM Websphere portal, you may find that only the administrator can see the Cognos portlets.

This problem can be caused by portlet access rights that are improperly set.

To fix this problem, log on to the portal as an administrator and grant your users Edit or View rights for each portlet as required.

Locale Mismatch in Cognos Navigator Portlet

If you use the Cognos Navigator portlet to view a report, the language used in the report may not match the language used in the browser.

This problem can occur if the locale selected for the portal is different than the default locale of the browser.

To fix this problem, set the locale selection for the portal to nothing selected. If no locale is selected, the portal uses the default locale for the browser.

Not Yet Optimized Cognos PowerCubes May Open Slowly in Cognos 8

If PowerCubes created with previous versions of Transformer take too long to open in the Cognos 8 Web studios, we recommend that you run a command line utility named pcoptimizer, supplied with Cognos 8, to improve run-time performance. This optimization utility is suitable for older PowerCubes when the model no longer exists or the data used to build the PowerCube is no longer available. It is not necessary to run this command line utility for cubes created in Transformer 8.3.

Steps

1. Back up your target PowerCube, then navigate to the *Cognos_8_installation_location*/bin directory.
2. On Windows, open a command line window and run PCOptimizer.exe.
3. On UNIX/Linux, enter the following line to run the optimization command line utility:
   `pcoptimizer [-t] [-v] [-h]` *`cubename`*

   where *cubename* is the fully qualified PowerCube or time-based partitioned control cube name with the .mdc extension, if the PowerCube resides in the same location as pcoptimizer. Otherwise, *cubename* is the full path with the .mdc extension.

   Note: This method only supports metadata extraction. To set up user-configurable drill-through, you must use Transformer. Wildcard character support is not currently available. You must therefore invoke the utility once per PowerCube. If *cubename* is not provided, the program enters an interactive mode, prompting you for a PowerCube name and accepting keyboard input. The optional parameters are as follows:

   - `-t` or test mode; it tests whether the metadata was extracted and loaded into the PowerCube. The return code indicates the status.
     - 0 if the metadata was extracted and loaded
     - 10 if the metadata was not loaded
     - 20 if an error occurred while accessing the PowerCube
   - `-v` or verbose mode; text is output to standard output (stdout), indicating what was done, including any error messages. If running in interactive mode, `-v` is assumed. All text is output in English only.
   - `-h` for command-line help; if *cubename* is not provided, it prints the usage and options to the screen.

Unable to Identify SAP BW Version and Corrections

You must use supported versions and patch levels of SAP BW, so you must be able to see a list of patches (correction notes) that have been applied. For more information about supported versions,

see the Cognos support website (http://support.cognos.com). To see a list of correction notes that have been applied, you can run one of two transactions in R/3: SE95, or SNOTE. In all cases, you must be authorized to run these transactions. In some cases, you may need to run the transactions using the same account that was used to apply the correction notes.

Steps

1. In SAP R/3, type /SE95 in the command window.
2. Enter an asterisk (*) in the Last Changed By field, to view all notes.
3. Select the type of modification in the Modifications tab.

Links to Referenced Content Objects are Broken Following Deployment

After you import a deployment archive to a new location, some links for objects associated with reports do not work.

When you import content objects which contain references to other objects that are not in the target environment, these references are removed. For example, if you deploy an archive containing reports based on a metadata package that is not in the deployment archive or the target environment, then the links will remain broken even if the referenced object is subsequently created.

To solve this problem, do one of the following:

- Reimport your deployment package after the target objects have been created. The objects will be automatically linked
- Manually reconnect the links to an object. For more information about manually resetting links, see the topic about selecting links for entry in the *Administration and Security Guide*.

Different User Interface for System on the Status Tab

If Cognos 8 is running on Websphere 5.1, the user interface for **System** on the **Status** tab in **Cognos Administration** is not the same as documented in the *C8 Administration and Security Guide*. Instead, you see a different user interface that lets you monitor and control your dispatchers and servers. The technology used to deliver this functionality is not fully supported in the WebSphere 5.1 platform.

No Interactive Activity for Current Activities on the Status Tab

If Cognos 8 is running on Websphere 5.1, there is no capability to select interactive activity for **Current Activities** on the **Status** tab in **Cognos Administration**. The technology used to deliver this functionality is not fully supported in the WebSphere 5.1 platform.

Chapter 35: Problems When Using Framework Manager

You may encounter problems when working in Framework Manager.

Measures Not Added After Initial Import in an Upgraded Model

After upgrading a Cognos ReportNet ® 1.x model to Cognos 8, measures that were added to the key figures folder for the underlying SAP BW object after the initial import will not be added when a synchronization is performed.

The solution is to re-import the object.

Note: This issue does not affect new models created in Cognos 8.

Unable to View the Result Set of a Stored Procedure

If the result set of a stored procedure contains a CLOB (character large object) or BLOB (binary large object), you must modify the stored procedure before running it.

Steps to Use CLOBS

1. Create a model query subject that references the stored procedure.
2. Insert a Cast or Substring function to calculate a string based on the CLOB.

Steps to Use BLOBS

1. Create a model query subject that references the stored procedure.
2. Remove the BLOB from the `Select` statement of the query subject.
3. Add query items to the `Select` statement that perform a lookup on the table that contains the BLOB data.

Unable to Compare Two CLOBs in Oracle

If you are using Oracle and ask Cognos 8 to compare two CLOBs, such as where C2 = C3, you will see an Oracle runtime error.

To avoid this problem, use the DBMS_LOB.compare method:

```
where 0 = dmbs_lob.compare (c1, c2)
```

An Out of Memory Error with ERWin Imported Metadata

When you test query subjects based on a View table, an Out of Memory error may occur while performing the `sqlPrepareWithOptions` operation.

The solution is to create a data source query subject using the same Content Manager connection as the ERWin model.

Calculation Fails Testing

You import a user-defined function, such as CHAR, that uses the same name as a vendor-specific function, such as char in Microsoft SQL Server. You insert the user-defined function in a calculation and test it in the **Calculation Definition** dialog box. The test fails.

The solution is not to use the same name as a vendor-specific function when creating a user-defined function. For information about function names used in your database, see the database product documentation.

Framework Manager Cannot Access the Gateway URI

You create a new project in Framework Manager and the following message appears:

Unable to access service at URL:

http://hostname:80/cognos8/cgi-bin/cognos.cgi/

b_acton=xts.run&m=portal/close.xts

Please check that your gateway URI information is configured correctly and that the service is available.

For further information please contact your service administrator.

This message appears if the gateway is not properly configured. The gateway URI must be set to the computer name where Cognos 8 is installed and reflect the type of gateway you are using. You must log on as an administrator to configure the gateway URI.

Steps to Configure the Gateway URI

1. Close Framework Manager.
2. In Cognos Configuration, in the **Explorer** window, click **Environment**.
3. In the **Properties** window, in the **Gateway URI** box, type the appropriate value:
   - To use ISAPI, replace cognos.cgi with **cognosisapi.dll**.
   - To use apache_mod, replace cognos.cgi with **mod_cognos.dll**.
   - To use a servlet gateway, type the following:

     http[s]://host:port/context_name/servlet/Gateway

Note:*context_name* is the name you assigned to the ServletGateway Web application when you deployed the ServletGateway WAR file.

- If you are not using a Web server, to use the dispatcher as the gateway, type the following:

  http[s]://*host***:***port***/p2pd/servlet/dispatch**

4. If required, change the host name portion of the **Gateway URI** from localhost to either the IP address of the computer or the computer name.
5. From the **File** menu, click **Save**.
6. From the **Actions** menu, click **Restart**.

Object Names Appear in the Wrong Language

When you import multiple languages from an SAP BW Query to a Framework Manager model, not all the object names retrieved from SAP BW appear in the correct language.

To avoid this problem, save the SAP BW Query again in each of the logon languages in Business Explorer Query Designer. The correct language texts will then show correctly in Framework Manager.

Full Outer Joins in Oracle Return Incorrect Results

When using an Oracle data source prior to version 10.2, full outer joins return incorrect data results. To avoid this problem, Cognos 8 processes these as local operations.

As a result of this processing, you must set the query processing to limitedLocal for any projects that expect explicit or implicit outer joins.

Error When Testing Query Subjects in a Model Imported from Teradata

You are using a model imported from Teradata. When you test some query subjects that contain graphic items, you see this error:

QE-DEF-0177 An error occurred while performing operation 'sqlOpenResult' status='-28'.

UDA-SQL-0114 The cursor supplied to the operation "sqlOpenResult" is inactive.

UDA-SQL-0107 A general exception has occurred during the operation "SgiCursor::doOpenResult ()".

[NCR][ODBC Teradata Driver][Teradata RDBMS] An unknown character string translation was requested.

The reason is that the `GRAPHIC` and `VARGRAPHIC` data types are not supported.

Error for Type-In SQL Query Subject

You define the following in DB2:

```
create type address as (
 number character (6),
 street varchar(35),
 city varchar(35)
 )
MODE DB2SQL;
create table emp ( emp_no int, emp_address address);
Select e.emp_no, e.emp_address..street from emp e
SQL0206N "aBmtQuerySubject.2
```

When you define a type-in SQL query subject, an error appears because of the name assigned for the attribute reference in the structured type.

To resolve this problem, you have two options:

- assign a simple correlation name to the column in the original query subject, such as `Select e.emp_no, e.emp_address..street as "ABC" from emp e`
- use pass-through notation for the query subject by surrounding the column with double curly brackets ({{ }})

Function Name Not Recognized

Cognos 8 does not validate the syntax you enter in expressions. The expression parser does not check the number or types of arguments for any function you use. This is because the database may accept different syntax or may have a function with the same name as Cognos 8 but a different signature.

If an expression will not run, review the **Tips** box in the expression editor for more information about the specific function you are using. The **Tips** box gives detailed information about each function.

QE-DEF-0259 Error

This error occurs if you use braces { } in the wrong position in an expression. Cognos 8 expects anything between the braces { } to be at the same level as a function. If you have used braces elsewhere in an expression, you will see the following error message:

QE-DEF-0259 There was a parsing error

You can also use braces to send unique syntax to the data source. For example, your database uses a keyword for a function but this keyword is not used in Cognos 8.

Cognos 8 does not validate the syntax you enter between braces. The syntax is simply sent to the data source.

The solution is to make sure that braces are not used in the wrong positions.

For example, you type the following in an expression:

```
[ss_ole_both].[authors_lith].[au_id] = [ss_ole_both].[authors_latin].[au_id]
 { collate Lithuanian_CI_AI}
```

You see the following error message:

```
QE-DEF-0259 There was a parsing error before or near
position: 75, text starting at position: 5 "le_both].[authors_lith].[au_id]=
[ss_ole_both].[authors_latin].[au_id]{"
```

Meanwhile the following expression is valid:

```
{ Q3.au_id }  =  { Q4.au_id collate lithuanian_CI_AI
}
```

QE-DEF-0260 Parsing Error

This error occurs if you pick a list of Query Studio filters that is too large or when the size of the string values for the keys is large.

One solution is to use predefined filters from Framework Manager instead of using the Query Studio interface. Also, we recommend that you pick columns and filter where the distinct list of values is relatively small.

Externalized Key Figures Dimension Retains Old Prompt Value

You have a key figures dimension (SAP BW) that contains an optional prompt. If you externalize this dimension as a csv or tab file, the externalized file does not contain all the rows of data. This is because the prompt value is retained.

For example, you set the prompt value for the dimension when testing the dimension in Framework Manager. The prompt value is kept in the cache. Even if you clear the value of the prompt in the Prompt dialog box, externalizing the key figures dimension results in a file containing data that is filtered by the most recently used prompt.

To avoid this problem, do one of the following:

- Do not test the key figures dimension before you externalize it.
- Close the model, open it again, and externalize the key figures dimension.

Older Cognos 8 Models Display Level Object Security

If you are using a previously-created Cognos 8 model, object security on a levelmay have been defined. Object security on a level is not supported.

The solution is to verify and repair the older model before publishing it.

Steps

1. From the **Project** menu, click **Verify Model**.
2. Select the security view that references a level and click **Repair**.

Exporting a Framework Manager Model to a CWM File Fails With Error *MILOG.TXT was not found*

Exporting a Framework model to a CWM file fails with error *MILOG.TXT was not found* when the path contains Japanese characters.

Do one of the following to solve this problem:

- Specify an export path that does not use Japanese characters.
- Change the system default language on your computer to Japanese. You can set the system default language in the Control Panel, under **Regional and Language Options** -> **Advanced**. For more information on how to do this, refer to the Windows operating system help.

Difference in SQL for Inner Joins After Upgrading to Cognos 8.3

If you migrated from Cognos 8.1 to Cognos 8.2 or 8.3, there can be differences in the generation of SQL used for the `INNER JOIN` syntax. You can control the SQL syntax used for inner joins by selecting the **Server determined** setting for the **SQL Join Syntax** governor. The SQL generated in Cognos 8.1, Cognos 8.2, and Cognos 8.3 produces the same results.

If you are using RDBMS materialization technology which can be implemented using either implicit or explicit syntax, you must ensure that you select the same syntax setting for the **SQL Join Syntax** governor in your model.

Unable to Select a Command for a Query Item in a Shortcut

You have a shortcut to a query subject or dimension. A shortcut is a pointer to a source object and the items in a shortcut are also shortcuts.

You cannot use shortcut query items in commands such as **Create**, **Relationship**.

Publishing a Large Package Results in a CCLOutOfMemory Error

When you try to publish a large package, you see this error message:

CCLOutOfMemory

To resolve this problem, reduce the size of your package by removing namespaces. You could also create a series of smaller packages that each target specific business goals.

Note: Publishing very large packages may negatively affect the future performance and maintainability of your models.

Chapter 36: Problems When Using Transformer

This document describes issues and limitations that may be encountered by Cognos 8 Transformer users, with suggested workarounds.

The information is organized into the following sections:

- "Known Issues When Modeling in Cognos 8 Transformer" (p. 559)
- "Known Issues Using Cubes in the Cognos 8 Studios" (p. 560)

Known Issues When Modeling in Cognos 8 Transformer

Documented in this section are known issues and limitations when modeling in Cognos 8 Transformer.

Importing Time Dimensions from Cognos 8 Packages Not Supported

When you create a query in Transformer based on a Cognos 8 Framework Manager package that contains hierarchical time-related categories, Transformer interprets the time-related categories as a regular dimension and not as a time dimension. As a result, the time dimension in your PowerCube will not contain any relative time categories.

Ensure that you import all of the data needed to define your time dimension, and use Transformer to create the date levels and categories.

Queries Against Multiple Hierarchies in the Same PowerCube Dimension Do Not Execute

In Cognos 8.3, when you run a query against a PowerCube requesting data from more than one hierarchy in the same dimension, you receive an error message indicating that the action is not supported. As a result, the report does not execute.

Your request fails to execute because, in the Cognos 8 Web studios, any grouping of categories from the same dimension that is not part of the primary hierarchical organization, such as relative time categories, special categories, or categories from an alternate drill path, is interpreted as a distinct new hierarchy in that dimension.

Data in Multiple Languages Does Not Display Properly

When you create a data source using a Cognos 8 report, and the report includes data in multiple languages, some of the language characters do not display properly in the Transformer Data Source Viewer. These characters are displayed as -- .

Transformer does not support reports with multilingual data as a data source. When the operating system locale is properly set, Transformer displays the characters for that locale.

There is no workaround for this problem.

Unable to Use an IQD Created in Framework Manager That Contains an Oracle Stored Procedure

In Transformer, when trying to open an IQD created in Framework Manager that contains an Oracle stored procedure, you may receive a message similar to the following:

(TR0118) Transformer can't read the database [datasource] defined in <Lan location>\ <datasource><iqd_name>.iqd.

DMS-E_General A general exception has occurred during operation 'execute'

The native SQL generated in an IQD created in Framework Manager is wrong. The IQD cannot be used in Transformer.

To resolve this problem, execute the stored procedure in Framework Manager and set the **Externalize Method** to **IQD**. Create a model query subject from the executed stored procedure, then publish the package and open it in Transformer.

Preventing Errors When Model Calculations Use Double Quotation Marks

If you try to open an .mdl-format model containing calculations that include double quotation marks, as might be used to create concatenated categories, you may get an error, even if you followed the recommended practice of wrapping these calculations in single quotation marks.

This is because .mdl-format models do not support the use of single and double quotation marks together, if the ObjectIDOutput flag is set to True, which is the default model creation setting.

To avoid this problem, you have two choices:

- You can open the cogtr.xml.sample file in a text editor, search for the string ObjectIDOutput, and change the setting to 0. Save the cogtr.xml.sample file as **cogtr.xml**. Restart Transformer, and resave the model.
- You can use your RDBMS or a tool such as Framework Manager to perform the required calculations, and then import the data into your model.

Whichever strategy you choose, you can then open the .mdl or py?-format model without error.

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Known Issues Using Cubes in the Cognos 8 Studios

Cognos 8 Transformer (Version 8.3) enables PowerCubes and their data sources to be published directly into the Cognos 8 environment, without requiring Framework Manager as an intermediary.

Documented in this section are known issues and limitations when viewing PowerCubes created for the Cognos 8 Web Studios, such as Analysis Studio and Report Studio.

Not Yet Optimized Cognos PowerCubes May Open Slowly in Cognos 8

If PowerCubes created with previous versions of Transformer take too long to open in the Cognos 8 Web studios, we recommend that you run a command line utility named pcoptimizer, supplied with Cognos 8, to improve run-time performance. This optimization utility is suitable for older PowerCubes when the model no longer exists or the data used to build the PowerCube is no longer available. It is not necessary to run this command line utility for cubes created in Transformer 8.3.

Steps

1. Back up your target PowerCube, then navigate to the *Cognos_8_installation_location*/bin directory.
2. On Windows, open a command line window and run PCOptimizer.exe.
3. On UNIX/Linux, enter the following line to run the optimization command line utility:
   `pcoptimizer [-t] [-v] [-h]` *`cubename`*

   where *cubename* is the fully qualified PowerCube or time-based partitioned control cube name with the .mdc extension, if the PowerCube resides in the same location as pcoptimizer. Otherwise, *cubename* is the full path with the .mdc extension.

   Note: This method only supports metadata extraction. To set up user-configurable drill-through, you must use Transformer. Wildcard character support is not currently available. You must therefore invoke the utility once per PowerCube. If *cubename* is not provided, the program enters an interactive mode, prompting you for a PowerCube name and accepting keyboard input. The optional parameters are as follows:

   - `-t` or test mode; it tests whether the metadata was extracted and loaded into the PowerCube. The return code indicates the status.
     - 0 if the metadata was extracted and loaded
     - 10 if the metadata was not loaded
     - 20 if an error occurred while accessing the PowerCube
   - `-v` or verbose mode; text is output to standard output (stdout), indicating what was done, including any error messages. If running in interactive mode, `-v` is assumed. All text is output in English only.
   - `-h` for command-line help; if *cubename* is not provided, it prints the usage and options to the screen.

Analysis Studio Shows the Wrong Currency Symbol

When published to Cognos 8 Analysis Studio, PowerCubes show a default currency rather than the currency associated with the locale of your servers and PCs. For example, GBP (£) is shown as $.

To resolve this problem, you can do one of the following:

- Create a currency table when you prepare your model in Transformer and embed a default currency symbol into the resulting PowerCubes, based on the system locale used by your Transformer computer.
- For PowerCubes that do not contain an embedded currency table, set the `fallbackCurrency` parameter as the default currency.

Steps to Create a Currency Table in Transformer

1. In Transformer, from the **File** menu, click **Currency Table** and click **OK**.
2. Right-click each currency measure and click **Allow currency conversion**.

   This default currency table does not include currency information for any locales other than your running locale. Also, you cannot convert to a different currency while working in Analysis Studio.

Step to Set fallbackCurrency as the Default Currency

- Define a default currency by setting the `fallbackCurrency` parameter in the *installation_location*\configuration\qfs_config.xml file to GBP (Great Britain Pounds) or to an alternative currency code as listed in the *installation_location*\bin\ccli18nrescr_xx.xml file.

  Here is an example.

```
<!-- execution layer providers-->
<provider name="PowerCubeODP" libraryName="pcodp"
connectionCode="PC">
    ...
    <providerDetails>
        <parameters>
           <!-- Max depth of nested calculated members
within a query. -->
           <parameter name="maxCalculatedMemberNestingDepth"
value="30"/>
           <!-- Normalize yen/won currency symbols
- set to "false" to disable -->
           <parameter name="normalizeYenWon" value="true"/>
           <!-- Fallback currency for cubes with no
default currency specified - set to USD, EUR etc. -->
           <parameter name="fallbackCurrency" value="USD"/>
        </parameters>
    </providerDetails>
</provider>
```

Changes to Decimals in Currency Formats

When you open a PowerCube in a Cognos 8.3 Web studio or in Cognos 8 Business Intelligence Mobile Analysis 8.3, you may notice changes in the number of default decimal places shown in currency formats.

This behavior is due to the following changes:

- The default decimal formatting in currency formats is now determined by the measure format selected in the cube, instead of from the data source currency table definition.

For example, if the Actual Revenue measure format specifies two decimal places and the USD currency in the currency table specifies no decimal places, two decimal places will appear in the USD currency value.

- Calculations that include a division operator and at least one currency operand will now show a resulting value with three decimal places only when
  - neither of the currency values includes decimals
  - two currency operands have different numbers of decimal places

  In all other calculations of this type, the number of decimals in the resulting value is determined by the number of decimals in the currency value. The following examples illustrate this new behavior:
  - $4.00 / $2.00 = $2.00
  - $4 / $3.0000 = $1.3333
  - $4 / $3 = $1.333
  - $4.0 / $3.00 = $1.333

Ragged or Unbalanced Hierarchies Result in Unexpected Behavior

In ragged or unbalanced hierarchies, some members that are not at the lowest level of the hierarchy may have no descendants at one or more lower levels. Support for these hierarchy gaps in relational sources is limited. For OLAP sources, more complete support is provided, but some reports may result in unexpected behavior:

- Groups corresponding to missing members may appear or disappear when grouped list reports are pivoted to a crosstab. This happens with set expressions using the filter function, and detail filters on members.
- Ragged and unbalanced sections of the hierarchy are suppressed when set expressions in that hierarchy are used on an edge.
- When a crosstab is sectioned or is split into a master-detail report, sections corresponding to missing members become empty.

Some of these behaviors may be corrected in a future release, while others may be codified as supported behavior. To prevent these behaviors, avoid the scenarios above.

The following scenarios are believed to be safe:

- one or more nested level references on an edge, with no modifying expression.
- a hierarchy reference on only one level of one edge.
- one or more explicit members or sets of explicit members as siblings on only one level of one edge.
- summaries of the previous three scenarios.

In all cases, reports based on ragged and unbalanced hierarchies should be tested to confirm that hierarchy gaps are handled correctly.

Error Opening Saved Reports After PowerCube Refresh

After a PowerCube is refreshed, when you open reports that include drill down on directly referenced special time categories, you may receive the following error:

OP-ERR-0025 The following OLAPPlanner internal error occurred: *internal error*

When drill down is not used, you will not receive the error; however, the data shown may not be correct.

There is no workaround for this problem.

Chapter 37: Problems Authoring Reports

Report Studio can be used to create different types of reports, including lists, crosstab reports, charts, and user-designed reports.

You may encounter problems when authoring reports in Report Studio or Query Studio.

For information about using Report Studio, see the Report Studio *User Guide*. For information about using Query Studio, see the Query Studio *User Guide*.

Problems Creating Reports

Planned, professional reports are created in Report Studio, and ad hoc reports are created in Query Studio.

The topics in this section document problems you may encounter when creating reports.

Chart Labels Overwrite One Another

In Report Studio and Query Studio, if you define a chart and render it in HTML or PDF format using the default sizes, the axis labels of the chart may overwrite each other.

To avoid this problem, make the chart wider or taller by modifying the height and width properties of the chart or enable the Allow Skip property.

Chart Shows Only Every Second Label

You create a report that includes a chart. The **Allow Skip** option is set to false, but when you run the report, labels are skipped.

This can occur if there is not enough room for all labels and the options **Allow 45 Degree Rotation**, **Allow 90 Degree Rotation**, and **Allow Stagger** are also set to false. Cognos 8 has no options for making the labels fit, so it skips every second label.

The solution is to select either **Allow 45 Degree Rotation**, **Allow 90 Degree Rotation**, or **Allow Stagger**.

Chart Gradient Backgrounds Appear Gray

In Report Studio, you can define a custom palette for a chart that includes a gradient. When the chart is rendered in HTML format, the chart background appears gray. This is a Microsoft Web browser issue.

To avoid this problem, select the chart and define the color white as the chart background.

For more information, see the Microsoft Knowledge Base article at http://support.microsoft.com/kb/294714.

Division by Zero Operation Appears Differently in Lists and Crosstabs

If you have a list that accesses a relational data source, a calculation containing a division by zero operation appears as a null value, such as an empty cell. In a crosstab, the division by zero operation appears as /0. This happens when the **Avoid Division by Zero** property is set to **Yes**, which is the default.

To have a consistent display of null values in lists and crosstabs, define an if-then-else statement in the expression in the crosstab cell that changes the value /0 to the value null.

Application Error Appears When Upgrading a Report

When upgrading a report, the following error appears if the report contains data items in the page layout that are not in a data container:

RSV-SRV-0040 An application error has occurred. Please contact your Administrator.

This error occurs when Cognos 8 cannot determine the query reference for a data item. Such data items are identified by a small red circle with a white x icon that appears in the lower left corner.

To correct the error, drag the data items into a container. If the container is a list, we recommend that you drag the data items into the list page header or footer, or the overall header or footer. If you want to see the first row of the item on each page or in the overall report, drag the item to the list page header or overall header. If you want to see the item's last row on each page or in the overall report, drag the item to the list page footer or overall footer. **Tip**: If a header or footer does not exist, create it.

Background Color in Template Does not Appear

When creating a Query Studio template in Report Studio, if you add a list object and change its background color, the color change does not appear when you apply the template to a Query Studio report.

To work around this issue, do one of the following:

- Edit the style sheet (CSS) classes for lists in Report Studio.
- Do not add any objects to the page body when you are creating a Query Studio template.
- Leave the page body blank.

Subtotals in Grouped Lists

When using a PowerCube that contains a ragged hierarchy, if you group on the first level in the hierarchy, subtotals may appear in the wrong place or show wrong values.

To resolve the issue, group on the second level.

Problems Filtering Data

You can use filters to specify the subset of records that the report retrieves. Any data that does not meet the filter criteria is eliminated from the report.

The topics in this section document problems you may encounter when using filters in reports.

In general, when creating filters, select functions that are available from the Vendor Specific list. You must use Tabular SQL for other functions.

Tip: If combining internal functions and vendor functions, set processing to **Limited Local**.

HRESULT= DB_E_CANTCONVERTVALUE Error When Filtering on a _make_timestamp Column

You cannot filter on a _make_timestamp column, and the following error messages appear:

UDA-SQL-0114 The cursor supplied to the operation "sqlOpenResult" is inactive

UDA-SQL-0206 The OLEDB driver returned the following value: HRESULT= DB_E_CANTCONVERTVALUE "

RSV-SRV-0025 Unable to execute this request

The solution is to apply the filter after aggregation and not before.

Report Distribution Problems

The topics in this section document problems you may encounter when distributing reports.

A Report Link in an Email Notification Does Not Work

If a report link in an email notification does not work, the Gateway URI may not be configured correctly.

You must change the host name portion of the Gateway URI from localhost to either the IP address of the computer or the computer name. If the URL in the email contains localhost, remote users cannot open the report.

Report Contains No Data

In Event Studio, if an agent running against a dimensionally modeled source passes values to a report based upon a relational source, the report may contain no data.

When the source is dimensional, the agent passes member unique names (MUNs) to the target report. If the target report is based upon the same dimensional source, the report runs correctly.

However, if the report is based upon a relational source, the agent must pass values (not MUNs) for the report to run correctly.

Steps to convert the MUN to a value

1. Drag the data item from the Insertable Objects tree to the Value field in the report task page.
2. Click in the field.
3. From the Insert menu, click Caption.

Hyperlinks in Email Messages Are Stripped Out When the Agent is Saved

In Event Studio, hyperlinks are stripped out when the agent is saved. The Administrator must allow email links to ensure that the links remain in emails created by agents

Steps to allow links in email

1. Add the following line to templates/ps/portal/system.xml: <param name="allow-email-links">true</param>
2. Restart the server.

Note: Adding this setting does not fix existing agents.

Steps to insert a link in an email

1. Highlight some text in the email.
2. Press Ctrl-K.
3. Enter a URL into the box that appears.

CNC-ASV-0001 The Following Agent Service General Error Occurred: java.lang.StackOverflowError

When running a web service task, you may encounter errors when the WSDL that describes the web service is very large.

Step to modify the bootstrap_win32.xml file

- To prevent this error, modify the file bootstrap_win32.xml in the bin folder to add the ThreadStackSize parameter:

  <process name="catalina"> ...<param condName="${java_vendor}" condValue="Sun">-XX: MaxPermSize=128m</param><param condName="${java_vendor}" condValue="Sun">-XX: ThreadStackSize=512</param>

Cannot Call the SDK from Event Studio

Even though Event Studio has a feature to insert a web service as a task, it is not possible to call the Cognos SDK web service. Due to the complexity of the SDK and complex data types and options, the web service feature in Event Studio does not handle the Cognos SDK.

The exception to this rule is the trigger command that can be called from Event Studio.

Chapter 38: Problems Running, Viewing, or Printing Reports and Analyses

You may encounter problems when running, viewing, or printing reports. For information about reports, see the Cognos Connection *User Guide*.

Problems Running Reports and Analyses

The topics in this section document problems you may encounter when running reports.

Summaries in Report Do not Correspond to the Visible Members

If a crosstab or chart created in Report Studio using a dimensional data source has a context-dependent set function such as `filter` or `topCount` on an edge, summaries do not correspond to the visible members. This occurs when the summaries use the `within set` aggregation mode.

This problem occurs because a summary that uses the `within set` aggregation mode uses a set that is dependent on the members that it intersects with on the opposite edge. For example, the following crosstab has as columns the top three products returned. The expression used to generate the columns is

`topCount`([Product],3,[Return quantity])

where [Product] is the level.

Return quantity	BugShield Lotion 89110	BugShield Extreme 90110	Sun Shelter 30 94110	Total(ReturnedProducts)	Minimum(ReturnedProducts)
Americas	25,219	19,870	13,814	62,392	17,303
Asia Pacific	22,822	19,171	6,389	54,758	12,765
Northern Europe	8,325	14,634	4,065	32,936	8,325
Central Europe	17,627	13,854	14,089	45,570	13,854
Southern Europe	7,196	4,726	5,401	20,220	5,790
Total(Region)	**81,189**	**72,255**	**43,758**	215,876	58,037
Minimum(Region)	**7,196**	**4,726**	**4,065**	20,220	5,790

The summary values for **Total**(**ReturnedProducts**) and **Minimum**(**ReturnedProducts**) for all rows except **Central Europe** do not correspond to the member values in the crosstab. This means that the top three products returned in all regions except for Central Europe are not Bug Shield Lotion 89110, Bug Shield Extreme 90110, and Sun Shelter 30 94110. Note that the summary values for **Total**(**Region**) and **Minimum**(**Region**) do correspond to the visible member values. That is because those summary values represent the total and minimum quantities returned for those three products in each region.

You can see what the top three products returned in each region are by dragging the columns to the right of the rows, creating the following single-edge crosstab.

Americas	*BugShield Lotion 89110*	*25,219*
	BugShield Extreme 90110	*19,870*
	TrailChef Water Bag 1110	*17,303*
	Total(ReturnedProducts)	**62,392**
	Minimum(ReturnedProducts)	**17,303**
Asia Pacific	*BugShield Lotion 89110*	*22,822*
	BugShield Extreme 90110	*19,171*
	Single Edge 73110	*12,765*
	Total(ReturnedProducts)	**54,758**
	Minimum(ReturnedProducts)	**12,765**
Northern Europe	*BugShield Extreme 90110*	*14,634*
	Star Peg 16110	*9,977*
	BugShield Lotion 89110	*8,325*
	Total(ReturnedProducts)	**32,936**
	Minimum(ReturnedProducts)	**8,325**
Central Europe	*BugShield Lotion 89110*	*17,627*
	Sun Shelter 30 94110	*14,089*
	BugShield Extreme 90110	*13,854*
	Total(ReturnedProducts)	**45,570**
	Minimum(ReturnedProducts)	**13,854**
Southern Europe	*Single Edge 73110*	*7,234*
	BugShield Lotion 89110	*7,196*
	TrailChef Cup 4110	*5,790*
	Total(ReturnedProducts)	**20,220**
	Minimum(ReturnedProducts)	**5,790**

To obtain summary values that reflect the visible members, modify the expression of the data item containing the context-dependent set function so that it includes a tuple that is locked to the default member of every hierarchy that appears on the opposite edge. For this example, modify the expression to the following:

`topCount`([Product],3,`tuple`([Return quantity], `defaultMember`([Retailer site])))

where [Product] is the level and [Retailer site] is the hierarchy.

When you run the report, all summary values reflect the visible members in the crosstab.

Return quantity	*BugShield Lotion 89110*	*BugShield Extreme 90110*	*Sun Shelter 30 94110*	Total(ReturnedProducts)	Minimum(ReturnedProducts)
Americas	*25,219*	*19,870*	*13,814*	**58,903**	**13,814**
Asia Pacific	*22,822*	*19,171*	*6,389*	**48,382**	**6,389**
Northern Europe	*8,325*	*14,634*	*4,065*	**27,024**	**4,065**
Central Europe	*17,627*	*13,854*	*14,089*	**45,570**	**13,854**
Southern Europe	*7,196*	*4,726*	*5,401*	**17,323**	**4,726**
Total(Region)	***81,189***	***72,255***	***43,758***	**197,202**	**42,848**
Minimum(Region)	***7,196***	***4,726***	***4,065***	**17,323**	**4,065**

Cannot Drill when Caption Represents a Blank or a Zero-length String

A dimensional model over relational data may return a zero length '' or blank ' ' caption in the row or column in Analysis Studio. When it does, you cannot drill up or down from the set because no link appears.

If this occurs, you can right-click the caption and select **Drill Up** or **Drill Down** in the shortcut menu.

DPR-ERR-2082 The Complete Error Has Been Logged by CAF With SecureErrorID

You cannot run a report in Cognos Connection, and the following error messages appear:

DPR-ERR-2082 An error has occurred. Please contact your administrator. The complete error has been logged by CAF with SecureErrorID: timestamp-#number.

RSV-DR-0002 Unable to execute this request.

These error messages do not indicate a Cognos Application Firewall problem.

You can view a more detailed error message, in the c8server.log file that resides in the logs directory on the Cognos 8 server.

Steps to View a Detailed Error Message

1. Open the cogserver.log file, which is in the *c8_location*\logs directory on the Cognos 8 server.
2. Search for SecureError or the timestamp-error number combination shown in the error message, such as 2004-06-29-15:15:03.796-#8.
3. The error message is under the SecureErrorID heading.

Query Studio Does Not Generate a SELECT DISTINCT statement if a Column is Aliased Without Using the Actual Column Name

When filtering on a column name, the query does not generate a SELECT DISTINCT statement if the referenced column is aliased by manually typing the alias in the SQL of the query subject.

To avoid this situation, do not manually type the alias. Instead, in Framework Manager, rename the column by right-clicking on it and selecting the **Rename** option.

Cannot Find the Database in the Content Store (Error QE-DEF-0288)

You cannot retrieve data from the selected database when running a report from Query Studio, Cognos Connection, or Report Studio.

The following error message appears:

QE-DEF-0288 Unable to find the database...

If this error does not occur when you are logged on as an administrator, then to solve the problem, ensure that the user has permissions to the signon embedded. If this error always occurs, the data source has not been created. Create the data source with the name mentioned in the error message.

Parse Errors When Opening or Running an Upgraded Report

Earlier versions of ReportNet and Cognos 8 included the cast_Date function for reports that run on an Oracle database. This function does not exist for Oracle in Cognos 8.1.2 MR1 and later versions. If a report that uses an Oracle database includes the cast_Date function, parse errors will be received when you try to open or run the report.

Overflow Error Occurs When a Value in a Crosstab Is More Than 19 Characters

In a crosstab report, values support a maximum of 19 characters, including the decimal point. If a value exceeds 19 digits, an overflow error occurs. By default, the decimal precision is set to 7 digits, which restricts the number of integers to 11 digits.

To use more than 11 integers, you must edit a configuration file to reduce the decimal precision. For more information, see the Cognos 8 *Administration and Security Guide*.

Cognos 8 Runs Out of TEMP Space

By default, Cognos 8 stores temporary files in the *c8_location*/temp directory. The amount of space required by the temporary files directory depends upon several factors, including the number and type of reports created.

The following error message indicates that the temporary files directory ran out of space:

QE-DEF-0177 An error occurred while performing operation 'sqlOpenResult'.

UDA-SQL-0114 The cursor supplied to the operation "sqlOpenResult" is inactive.

UDA-TBL-0004 There was a Write error while processing a temporary file.

If this error occurs, ensure that the disk on which the temporary files directory is located has adequate space. You should also periodically delete unwanted files from this directory.

A Report Does Not Run as Expected

A report may not run as expected if the model contains errors or the wrong governor settings.

Steps to Check the Model

1. Open the model in Framework Manager.
2. Ensure governors are set to **disallow**.
3. In the diagram view, ensure that there are no cross-join errors or ambiguous joins.
4. Check the package for a missing query subject.
5. Run the **Verify Model** function, and correct any errors detected.

Performance Issues when Showing Multiple Attributes Using Dimensionally Modeled Relational Data Sources

If you display multiple attributes for the items in a set on the crosstab, you can only select one attribute at a time, so Analysis Studio executes a query for each attribute selection.

The performance of this approach is an expensive one to execute against a relational data source because of the query necessary to retrieve the attribute and its value.

You can select multiple attributes for a selected crosstab set in Analysis Studio by using the **Properties** pane . By selecting multiple attributes before clicking **OK** or **Apply** in the dialog box, only a single

query for all selected attributes is executed, instead of one per attribute. Multiple selection in the UI is the preferred approach for enabling the display of more than one attribute for dimensionally modeled relational data source packages, because of the reduced performance impact on the relational data source.

Analysis Studio Shows the Wrong Currency Symbol

When published to Cognos 8 Analysis Studio, PowerCubes show a default currency rather than the currency associated with the locale of your servers and PCs. For example, GBP (£) is shown as $.

To resolve this problem, you can do one of the following:

- Create a currency table when you prepare your model in Transformer and embed a default currency symbol into the resulting PowerCubes, based on the system locale used by your Transformer computer.
- For PowerCubes that do not contain an embedded currency table, set the `fallbackCurrency` parameter as the default currency.

Steps to Create a Currency Table in Transformer

1. In Transformer, from the **File** menu, click **Currency Table**, and click **OK**.
2. Right-click each currency measure, and click **Allow currency conversion**.

   This default currency table does not include currency information for any locales other than your running locale. Also, you cannot convert to a different currency while working in Analysis Studio.

Step to Set fallbackCurrency as the Default Currency

- Define a default currency by setting the `fallbackCurrency` parameter in the configuration/qfs_config.xm file to GBP (Great Britain Pounds) or to an alternative currency code as listed in the /ccli18nrescr_xx.xml file.

  Here is an example.

```
<!-- execution layer providers-->
<provider name="PowerCubeODP" libraryName="pcodp"
connectionCode="PC">
    ...
    <providerDetails>
        <parameters>
           <!-- Max depth of nested calculated members
within a query. -->
           <parameter name="maxCalculatedMemberNestingDepth"
value="30"/>
           <!-- Normalize yen/won currency symbols
- set to "false" to disable -->
           <parameter name="normalizeYenWon" value="true"/>
           <!-- Fallback currency for cubes with no
default currency specified - set to USD, EUR etc. -->
           <parameter name="fallbackCurrency" value="USD"/>
        </parameters>
    </providerDetails>
</provider>
```

Error Occurs in Japanese Internet Explorer 7 When Running an Excel Report in Analysis Studio

An error may occur when you close Japanese Internet Explorer 7 installed on Windows XP SP2 while it is running an Analysis Studio report in Excel format.

To solve this problem, Microsoft recommends that you unregister the msctf.dll file using the following command:

```
Regsvr32/U Msctf.dll
```

This .dll file is part of the ctfmon.exe speech recognition application. You may turn off any speech recognition application installed on your computer before unregistering the .dll file.

For more information about turning off speech recognition, see

http://support.microsoft.com/kb/313176/EN-US/

The ORA-00907 Error Appears When Running a Report

When using an Oracle 9.2 data source, under certain circumstances, multiple or nested join operations may fail and produce the following error:

ORA-00907: missing right parenthesis

A query that uses both a left outer join and an ON clause condition returns zero values instead of null values.

Drilling Through to Cognos 8 from a Cognos Series 7 Product Results in Firewall Error

You use a Cognos Series 7 product that is configured to use a proxy server. When you drill through to Cognos 8, the following error message appears:

DPR-ERR-2079 Firewall Security Rejection. Your request was rejected by the security firewall. Please try again or contact your administrator.

This is because the Cognos 8 Web server does not recognize the proxy server name and rejects the entry.

To correct this problem, add the proxy server name in Cognos Configuration.

Steps to Add a Proxy Server Name

1. Start Cognos Configuration.
2. In the **Explorer** window, click **Security**, and then click **Cognos Application Firewall**.
3. In the **Valid domains or hosts** box, add the proxy server name.
4. From the **File** menu, click **Save**.
5. From the **Action** menu, click **Start**.

Scheduled Reports Fail

You schedule reports that previously ran successfully, but now fail. The following error message appears:

CAM.AAA Error authenticating user

This may happen because a user changed a password. Cognos 8 uses a copy of the user ID and password to run the scheduled report.

The solution is for the user to renew their credentials.

Steps to Renew Credentials

1. Ask the user who scheduled the report to log on to Cognos Connection.
2. In Cognos Connection, click the my area button and click **My Preferences**.
3. On the **Personal** tab, scroll to the **Credentials** section.
4. Click **Renew the credentials**.

   Note that this does not apply to users from a Cognos Series 7 namespace.

The Table or View Was Not Found in the Dictionary

When you run a report, the following error message appears:

The table or view "xxx" was not found in the dictionary.

This may occur if permissions were not properly set.

Ensure that the user defined in the data source has SELECT privileges for the affected table.

Mixed Languages Are Displayed in Cognos Connection When Using Samples

When you restore the Cognos_samples.zip file in the webcontent/samples/content folder it contains multilingual content. When you change the locale setting on your computer, reports appear in the language specified for your computer. This is not true for sample Cognos PowerCubes. When you restore Cognos_powercube.zip or Cognos_powercube_financial.zip, a different folder is set up for each language. If you select a PowerCube from a language folder that is different than the language specified by the locale setting on your computer, a mixture of languages is displayed in Cognos Connection.

There are two options for solving this problem:

- Re-install Cognos_powercube.zip or Cognos_powercube_financial.zip. First ensure that your computer is set to the locale that is consistent with the language of the PowerCube package you are installing. Then, install only the package from the language folder that matches the locale setting.
- Or, in Cognos Connection, open each PowerCube package, click the **Set Properties** button, and in the **Language** box, select the language of the Cognos PowerCube.

Unable to Select Multiple Report Formats When Running a Report

When running a report with options, you cannot select multiple formats when the delivery option is to view the report.

Before selecting multiple formats on the Run with advanced options page, you must first change the Delivery option to Save the report, print it, or send an email.

A Report Does Not Run as Scheduled

A scheduled report may fail, or an administrator may cancel it.

To view the run history and status of a report you scheduled and to view detailed information about why a scheduled report failed, do the following:

Steps

1. In Cognos Connection, click the my area button, and click **My Activities and Schedules**, **Schedules**.
2. Click the arrow next to the item to view the Actions menu, and then click **View run history**.

   The **View run history** page appears.
3. To view the run history details, in the **Actions** column, click the view run history details button.

A Report or Analysis Does Not Run Because of Missing Items

You attempt to run a report or analysis and a message indicates that one or more items are missing or changed. Each missing item is listed by its MUN (member unique name). The MUN includes the compete path within the hierarchy for the item. When you place your cursor on an item in the **Insertable Objects** pane, the MUN for that item is displayed in a tooltip. This situation may occur if members have been removed from or changed in the data source. It may also occur when you attempt to run a report that uses items to which you do not have access. For example, an administrator may create an analysis that includes items that you don't have the correct permission to access.

The solution is to find a suitable replacement in the **Insertable Objects** pane, and drag it to the **New Item** column. The report or analysis will then run.

Cannot View Burst Report

When you burst a report, each burst output is sent to the associated list of recipients. If a list of recipients contains invalid entries, the following occurs:

- The burst output is not saved to Content Manager.

  Consequently, you cannot view the burst output in Cognos Connection.
- If you choose to send the output by email, only valid recipients will receive an email. Although the output is sent as an attachment if you select the **Attach the report** check box, no link is generated if you select the **Include a link to the report** check box.

- The following error message appears in the run history for the report, where parameter 1 is the burst key, parameter 2 is the list of recipients, and parameter 3 contains the error messages returned by Content Manager:

  An error occurred while saving the output for the burst instance <param type="string" index="1"/> with the recipients (<param type="string" index="2"/>). Here are the details: <param type="string" index="3"/>

  Note: The list of recipients includes both the valid and invalid recipients.

For example, a report is set up to burst on Country, and the recipients are managers. Running the report produces the following countries and recipients:

- Canada: John, Mary
- US: Peter, Frank
- France: Danielle, Maryse

Frank is an invalid recipient. The burst outputs for Canada and France are saved to Content Manager, but not the U.S. output. If you choose to send an email to each recipient and you selected the **Include a link to the report** check box, the email to Peter will not contain a link to the output for US. The error message that is generated will contain Peter and Frank as values for parameter 2 with no indication as to which is invalid.

To resolve the problem, do the following:

Steps to Correct or Remove Burst Recipients

1. View the error message in the run history for the report.
2. From the list of recipients, determine which recipients are invalid.

   You may need to consult with your administrator to find out which recipients are invalid.
3. Correct or remove the invalid recipients.

   Correcting or removing invalid recipients will depend on how the list of recipients was defined, such as through a calculated field or a burst table.
4. Run the report again.

Performance Problems When Running Reports

The topics in this section document performance problems you may encounter when running reports in Cognos Connection.

CGI Timeout Error While Transferring Data to Cognos 8 Components

When performing operations through your Web browser, you receive the following error message:

CGI Timeout, process will be deleted from server.

The error occurs when you use Windows Internet Information Services (IIS) as your Web server and the gateway is configured to use CGI. IIS has a default timeout for CGI applications.

To resolve this problem, you can configure the gateway to use ISAPI. IIS does not have a default timeout for ISAPI applications. Or, if you want to keep using a CGI gateway, you can increase the CGI timeout in IIS.

Steps to Change the Gateway to ISAPI

1. On the gateway computer, start Cognos Configuration.
2. Under Environment, for the Gateway URI property, change the cognos.cgi portion of the URI to cognosisapi.dll.
3. In your Web browser, specify the ISAPI URI:

   http://*computer_name*/cognos8/isapi

Steps to Increase the CGI Timeout

1. In the Windows administrative tools, open **Internet Information Services**.
2. Under the local computer node, right-click **Websites** and select **Properties**.
3. In the **Home Directory** tab, click **Configuration**.
4. In the **Process Options** tab, increase the **CGI script timeout**.

Slow Server Performance

If your content store has many users and policies, clients reading schedule information for many users can slow down server performance for all users.

To correct this problem, administrators can remove the Entries I Own, Public Folders, and Any options from the Scope list on the Schedule Management page.

You can use a URL or edit the system.xml file to remove user interface elements for most users while showing the user interface elements to other users, such as the administrator.

The following table describes these user interface elements.

User interface element	Description
SMT_SCOPE_any	'Any' value from the Scope list in the Schedule Management tool.
SMT_SCOPE_entries_i_own	'Entries I Own' value from the Scope list in the Schedule Management tool.
SMT_SCOPE_public_folders	'Public Folders' value from the Scope list in the Schedule Management tool.

For information about hiding user interface elements, see the Cognos 8 *Administration and Security Guide*.

The BAP-ERR-0002 BAPI Error

When using Cognos 8 with an SAP BW data source, the following error message may appear:

BAP-ERR-0002 BAPI error occurred in function module BAPI_MDDATASET_CHECK_SYNTAX. Error occurred when starting the parser.

This error usually occurs because the SAP BW server is overloaded.

To resolve this problem, restart the Cognos 8 server or close all open connections from the SAP BW Administrator Workbench.

The Out of Memory Error Appears in HP-UX

In HP-UX, the default setting for the threads per process is too low for most Java applications.

To avoid out of memory errors, increase the value for the following kernel parameters:

- `max_thread_proc`
- `nkthread`.

Note: The `nkthread` parameter should be double the value of the `max_thread_proc` parameter.

For more information, see the HP Web site.

A Query Is Slow When Filtering Non-ASCII Text

When using an SAP BW data source, and range filters are defined on non-ASCII text values, such as city names that contain accented characters, the query may take longer to run. This occurs because the filter must be performed on the application server and not on the SAP BW server because SAP BW 3.0B supports queries only if they use ASCII values.

To avoid this problem, do not filter non-ASCII values.

Query Studio Output Takes a Long Time to Run

In Cognos Connection, you click Run with Options and select the Save the report delivery option. This action returns all data, renders the report, and stores it in the content store, which can take a long time.

It is quicker to run the report manually, using the Run command, which generates the report a page at a time.

Problems Viewing Reports

The topics in this section document problems you may encounter when viewing reports.

A Report Upgraded from ReportNet Does Not Retain its Original Look

When you upgrade a report to Cognos 8, a new style sheet is applied that changes the look of the report.

To preserve the formatting that was used in the original report, you can select a different style sheet. This retains the original look of the report and specifies that any new items added to the report, such as list columns or crosstab levels, have the original formatting applied to them.

Steps

1. In Report Studio, from the **File** menu, click **Report Properties**.
2. Select the **Use 1.x report styles** check box.

Drill-through Links Not Active in the Safari Browser

When viewing a PDF report in the Macintosh Safari browser, you cannot open hyperlinks. This is because the macintosh Safari browser does not have the necessary Adobe Acrobat plug-in.

To avoid this problem, use the HTML format when creating drill-through reports that may be viewed in Safari.

A Running Total in Grouped Reports Gives Unexpected Results

You have a running total calculation in a grouped report that returns unexpected values.

Because tabulation of the running total calculation depends on the order in which the grouping is executed, you must ensure that the grouped totals are tabulated before applying the running total.

To ensure that the grouping is executed in correct order, define a running total calculation as a freestanding calculation outside the query subject in Framework Manager, and ensure that the Regular Aggregate property is set to Automatic.

This may also be an issue with other running, moving, and ranking aggregations.

The Page Cannot Be Found Error Appears When Viewing Report Outputs from Email Links

When a report is distributed by email, no error message appears if the report output from the email link is not available. This can occur when the output is deleted or when the user does not have permissions to the report. Instead, the error "The Page Cannot Be Found" appears.

You are unable to view the report output from the email link when Allow Anonymous Access is set to true and when the Anonymous user does not have access to the report output.

When you run a secured report from an email link and when Allow Anonymous Access is set to True, a passport is automatically issued to the Anonymous user. The Anonymous user is not prompted to log on and is unable to view the report output.

Non-English Characters Appear as Placeholders

Cognos 8 and Framework Manager are Unicode applications. A Unicode application permits handling of content in any language, or any combination of languages. However, if your database contains non-English characters, and if the database client is not configured to receive these characters, some characters may appear as placeholder characters, such as boxes or inverted question marks.

To avoid this problem, ensure that your database clients are properly configured. For more information, see your database vendor documentation.

For Oracle 9, you can force the use of Unicode on the client by ensuring that the system environment variable NLS_LANG is set to "xxx.UTF8", where xxx is whatever is needed for other applications on that computer. If there are none, the value can be simply .UTF8.

For information about configuring your database for multilingual reporting, see the Cognos 8 *Administration and Security Guide*.

While enforcing the use of Unicode on the database client guarantees that it can handle multilingual data, some characters in some character sets may still appear incorrectly, such as Japanese Shift-JIS. For information about configuring Shift-JIS characters, see the Cognos 8 *Administration and Security Guide*.

Cannot Drill Between PowerCubes Because MUNs Do Not Match

A Cognos PowerCube has category codes and source values that are different. Its source values are conformed with another PowerCube however the category codes in both PowerCubes are different. You cannot drill between shared dimensions in these PowerCubes because their Member Unique Names (MUN) do not match. The source value for a PowerCube member is used as the member business key in Cognos 8. If the source value business key is conformed between PowerCubes, you can pass the business key in a calculation to drill through between two cubes where the MUN does not match.

This technique works only if the business keys are unique. If the business keys are not unique, then the result may be unexpected. For example, drilling through from London, England in the source may produce a drill-through report that contains both London, England and London, Ontario.

If drilling through was not enabled at build time, the source cube will pass the category code instead of the source value.

To pass the business key to the target, do the following:

- Create the target report parameter by typing:

  roleValue('_businessKey',[member])=?prompt?

When you drill through, the business key is passed.

For more information about drill-through access, see the Cognos 8 *Administration and Security Guide*.

Unexpected Results When Drilling from a Cube to a Relational Data Source

When you drill from a cube to a relational data source, sometimes no value is found. Other times, the wrong data item appears. The reason for this is that the business key values in the two data sources do not match. Note that the source value for a PowerCube member is used as the business key in Cognos 8 studios.

If the target data source has a query item, for example display name, that corresponds to a member property in the source cube, for example caption, you can pass the caption from the cube to the relational target. You must also modify the drill-through definition object by replacing the original member mapping with the new one. This technique is only supported when the drill through definition is authored in Report Studio.

The business key is passed from the cube source only if the target is a value parameter, and the cube source data item is one of the following:

- business key
- member or member set

Steps to Pass the Caption to the Target

1. In the cube source report, create a calculation that retrieves the caption of the member. Type the following

   caption([*member*])

2. Ensure that the target report has its parameter on the data item, and not on the business key.

When you drill through, instead of the business key, the selected value is passed to the target.

For more information about drill-through access, see the Cognos 8 *Administration and Security Guide*.

Cannot Drill From a Relational Source to a Cube

You cannot drill through from a relational data source to a cube. This is because a cube expects a Member Unique Name (MUN) as a parameter value and relational sources do not use MUNs.

Members have several properties such as a business key and a caption. If either of these match data items within the relational source, drilling through can be performed as long as the cube target report is authored in Report Studio.

If the source data source has a query item, for example display name, that corresponds to a member property in the target cube, for example caption, you must create the parameter on the caption in the target report.

To pass the data item to the cube target, do the following:

- In the cube target report, create a parameter that accepts the caption of the member. Type the following

  caption([*member*])=?*prompt*?

When you drill through, the selected value is passed to the target.

For more information about drill-through access, see the Cognos 8 *Administration and Security Guide*.

Charts Do Not Appear in HTML reports

In Cognos 8, HTML output reports are displayed in Microsoft Internet Explorer 6.x with 24-bit transparency to ensure that the appropriate color depth is displayed, typically for charts.

If you operate in an environment that requires the Internet Explorer 6.x security level to be set to high, charts may not appear. If you cannot lower the security setting for security reasons, you may want to disable chart transparency. Charts are displayed in Internet Explorer with transparencies displayed in white.

You must have the required permissions to access **Cognos Administration** functionality. See "Secured Functions and Features" (p. 199).

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the Change view menu. Click **Services**, **Report Data**
5. Click the arrow next to the service to display the Actions menu, and then click **Set Properties**.
6. Click the **Settings** tab.
7. For the **Environment** category, next to **Advanced settings**, click the **Edit** link.
8. If it appears, select the **Override the settings acquired from the parent entry** check box. Otherwise, proceed to the next step.
9. In the **Parameter** column, type **EnableChartTransparencyIE**.
10. In the **Value** column, type **False** to disable chart transparency in Internet Explorer.
11. Click **OK**.
12. Click **OK** again.

Portal Problems

The topics in this section document problems you may encounter with a portal when viewing reports.

Cannot Connect to a SQL Server Database Using an ODBC Driver

The connection works in Framework Manager, and metadata can be imported. When testing the database connection in the Cognos Connection portal, the following error messages appear:

QE-DEF-0285 Logon failure

QE-DEF-0325 The cause of the logon failure is:

QE-DEF-0068 Unable to connect to at least one database during a multi-database attach to 1 database(s) in: testDataSourceConnection

UDA-SQL-0031 Unable to access the "testDataSourceConnection" database.

UDA-SQL-0129 Invalid login information was detected by the underlying database.

[Microsoft][ODBC SQL Server Driver] [SQL Server] Login failed for user '(null)'. Reason Not associated with a trusted SQL

The solution is to change the Network Library Configuration for SQL Server to use TCP/IP instead of Named Pipes.

Steps to Set TCP/IP as the Network Library Configuration

1. Open **ODBC Data Source Administrator**.

   Tip: In Windows 2000 you can do this by clicking **Start**, **Settings**, **Control Panel**, **Administrative Tools**, **Data Sources (ODBC)**.

2. Select the data source name defined for SQL Server on the **System** or **User DSN** tab.
3. Click **Configure**.
4. On the **Microsoft SQL Server DSN Configuration** page, click **Next**.
5. Click **Client Configuration**.
6. Ensure that **TCP/IP** is selected for the Network library entry.

The My Folders Tab Does Not Appear After Logging On to Cognos Connection

A user is a member of a new group, and this group is a member of the Query Users group. When this user logs on, the My Folders and the personalized pages tabs do not appear in Cognos Connection. Also, the user name does not appear in the upper-left corner of Cognos Connection.

To avoid these problems, the namespace to which the user belongs must have traverse permission to the Query Users group.

Steps to Specify Traverse Permission

1. Log on to Cognos Connection as an administrator.
2. From the **Launch** menu, click **Cognos Administration**.
3. On the **Security** tab, click **Users, Groups, and Roles**.

4. Click the set properties button next to the namespace.
5. Click the **Permissions** tab.
6. Ensure that the **Query Users** group appears in the namespace.
7. Select the Query User **Traverse** check box.
8. Click **Apply** and then click **OK**.
9. Test with a user.

Icon Graphics Are Not Working in Portlets

When you access Cognos portlets in SAP EP or WebSphere, icons and pagination graphics may appear as empty rectangles.

This problem can be caused by improper settings in Cognos Configuration.

Steps to Change Settings

1. Start Cognos Configuration.
2. In the **Explorer** window, under **Environment**, click **Portal Services**.
3. Ensure that all URIs use absolute server names instead of localhost.

Styles Used in the Previous Installation Still Appear

You can customize the styles (previously called skins) used by Cognos 8. The styles are applied when users access Cognos Connection.

If you reinstall Cognos 8, styles from the previous installation may still appear when users access Cognos Connection. The styles are cached by the browser.

If you do not want to apply customized styles, ensure that users delete the temporary files from the browser cache.

Unable to Click Links

Links in Cognos Connection will not work if your browser is not properly configured. Consequently, you cannot perform operations such as running a report or starting Report Studio. For all Web browsers, cookies and JavaScript must be enabled.

For more information, see your browser help.

For Internet Explorer only, the following must be enabled:

- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting
- Active scripting

Cognos does not provide or download ActiveX controls as part of Cognos 8. Report Studio uses the native Internet Explorer XML support, which is an integral component of the browser. Because Microsoft implements XML using ActiveX, you must enable ActiveX support for Report Studio.

Steps to Enable Internet Explorer Options

1. In Internet Explorer, from the **Tools** menu, click **Internet Options**.
2. On the **Security** tab, click **Custom Level**.
3. In the **Security Settings** dialog box, scroll to the **Activex controls and plug-ins** settings and enable **Run Activex controls and plug-ins** and **Script Activex controls marked safe for scripting**.
4. Scroll to the **Scripting** settings and enable **Active scripting**.
5. Click **OK**.

Missing Images in a PDF Report

Images that appear in reports rendered as HTML are missing in reports rendered as PDF. The embedded GIF, JPG, and BMP images do not appear. Only the borders of the missing images appear.

If you use Microsoft Internet Information Services (IIS), go to the properties sheet of the Web site and ensure that the **Enable the HTTP Keep Alives** option is selected.

Ensure that the virtual directory where the images are stored has anonymous access enabled. Open IIS and open the properties sheet for the virtual directory for your images. Select the **Anonymous Access** check box.

Charts in PDF Output Show Unexpected Results

Charts, when viewed in PDF output, have different levels of interaction support, depending on the version of Adobe Acrobat Reader and the style of chart element.

Adobe Reader version 5 does not support tooltips. Drill up and down and Go to links have limited support, due to technical limitations. Only rectangular areas in charts, such as bars, columns, horizontal labels on the axis, or legend labels can be enabled for drill or Go to interaction. Non-rectangular areas, such as pie slices in pie charts, cannot be enabled for drill or Go to interactions.

Adobe Reader version 6 and 7 supports tooltips, drill up and down, and Go to links for all chart types. When chart elements overlap or are separated by only a few pixels, the interactive region may be smaller than the area shown.

Problems Printing Reports

The topics in this section document problems you may encounter when printing reports.

Unable to Print PDF Reports

When you try to print a PDF report from Cognos Connection and Report Studio, you may be unable to print or an error message such as the following may appear:

CNC-GEN-2107: An unexpected error has occurred.

There may be no error messages and the status of the print job is Succeeded.

To correct the problem, try the following:

- Ensure that Adobe Reader version 5.0.5 or later is installed on each computer where Cognos 8 servers are installed.
- Ensure that the Cognos 8 server is started using an account that has access to the network printer. Sometimes, system accounts may not have access to network printers.
- If Cognos 8 is installed on UNIX, ensure that Adobe Reader is installed in the path of the user that starts Cognos 8.
- If Cognos 8 is installed on UNIX, ensure that the lpstat -v command returns a configured printer and that a printer variable is defined.
- When you define the network address for the printer in Cognos Connection, use the following syntax:
  - For Windows: *server_name**printer_name*
  - For UNIX: *printer_name*
- When you define the network address for the printer, try using the IP address of the printer instead of the computer name.
- Ensure that Cognos 8 users have the correct access permissions for the printer.

Tip: In Cognos Connection, from the **Launch** menu, click **Cognos Administration**. On the **Configuration** tab, click **Printers**. Click the arrow next to the printer to view the Actions menu, and then click **Set properties**. Click the **Permissions** tab.

- Ensure that the Directory Administrators group has all the access permissions granted and that the group Everyone has Read, Execute, and Traverse access permissions granted.
- Ensure that you can print a test page on the printer.
- If Tomcat is used as an application server, the crn_ROOT environment variable must not be defined.
- Ensure that users have read, execute, and traverse permissions for the printer object in Cognos Connection.
- The printer name consists of only the first 127 ASCII characters.

A Printed HTML Report is Unsatisfactory

Printing HTML may produce unsatisfactory results.

For best results, use the View in PDF Format command, and then print the PDF. This alternative gives you more control over such things as pagination than the browser does.

Chapter 39: Problems When Using Map Manager

This section provides solutions for problems you may encounter when using Map Manager. For information about Map Manager, see the Map Manager *Installation and User Guide*.

Problems Importing Files

You may encounter problems when you try to import a map file or text file.

Error Importing Translated Text File

When you import a TXT or CSV file that has been translated, you receive an error message similar to the following:

Unable to save the file.

An error occurred while importing the map file.

Unable to import. The translation file contains no useful content.

The problem may be caused by one of the following:

- The map file that is open is not the map from which you created the export translation file.
- Features were added or deleted in the file.
- Columns (extra tabs or commas) were added to the file.
- The data was sorted and is now in a different sequence than when it was first exported.

To resolve the problem, first ensure that the correct map file is open. If it is, then resend the original exported file for translation and specify that the contents must not be sorted, deleted, added to, or modified except to add translated features. If required, export the translation features and languages again.

Chapter 40: Problems With Metrics

This section provides solutions for problems you may encounter when using Metric Studio. For information about Metric Studio, see the Metric Studio *User Guide for Authors*.

Data from a Relational Database Source or a Flat File Data Source Does Not Appear

You use Cognos Connection to load data into the metric store.

If Cognos Connection encounters a problem while loading data from a relational database source or a flat file import source, the data will not appear. Typical problems include

- text fields that are too long
- required fields are missing
- duplicate rows
- references to non-existent objects.

To find the error, run the batch file or shell script from the command line and check the status of each step. Alternatively, you can repeat the loading process in two stages through the user interface and check the success of each stage.

Steps to Separate the Loading Process into Stages

1. In Cognos Connection, under the Metric Maintenance folder for your package, click **Import data from files into staging area**.
2. Use an SQL query tool to check whether the data was loaded.

   If not, ensure that you have

   - defined the data source correctly and that the files are in the correct location
   - formatted the flat file with tab-delimited columns
   - included the correct number of columns
   - used the correct data formats, such as yyyy-mm-dd for dates and a period for the decimal separator

   The logs from the attempt to load each tab-delimited file can be found at *installation_location*/logs/Metric Maintenance/*databasename-timestamp*/BulkLoad, and may contain more descriptive error messages than are available from the user interface.
3. If you find errors, correct them and repeat steps 1 through 3.

4. After the data appears in the staging tables, in Cognos Connection, under the Metric Maintenance folder for your package, click **Transfer data from staging area into metric store**.
5. Check whether the data appears in Metric Studio.

   If not, check the last three columns of the kpi_value_stage_rejects table for error information.

A Metric Maintenance Task Fails to Run

If you manually run a metric maintenance task and it fails, Metric Studio displays an error message. If you run a scheduled metric maintenance task, you should check the run history to verify if the task was successful or not. For more information, see the *Administration and Security Guide*.

To determine the cause of a failed task, check the logs located in *installation_location*/logs/DIS/*package_date_time*. The logs for each metric maintenance task are kept in a folder named with the task's package name, date, and time.

You Do Not Have Permission to Access This Metric Package. Contact Your System Administrator.

You must have Read, Execute, and Traverse permissions to open Metric Studio using the link on the Welcome page or in Cognos Connection.

Ask your system administrator to check your access permissions. For more information, see the *Administration and Security Guide*.

Failed to Check the Metrics Store install Status Error When Using DB2 8.2.3

When you try to create a metric package using DB2 8.2.3 as the data source, you may receive the following error message:

Failed to check the metrics store install status

If the version of the DB2 client on the Metric Studio computer is not the same version as the DB2 server, or you upgraded your DB2 instance, you must run commands to bind the DB2 client to the database. Run the commands on the Metric Studio computer.

On Windows, run the commands in a db2cmd window from DB2InstallDir\sqllib\bnd.

On UNIX, run the commands from DB2InstanceDir/sqllib/bnd.

Type the following commands:

db2 connect to database user userName

db2 bind @db2ubind.lst blocking all grant public

db2 bind @db2cli.lst blocking all grant public

db2 bind db2schema.bnd blocking all grant public sqlerror continue

db2 terminate

Errors Occur When Importing Tab-delimited Files into a DB2 Metric Store

When Metric Studio is installed on Windows and the DB2 metric store is installed on UNIX, errors occur when you run metric maintenance tasks to import tab-delimited files into the staging tables or into the metric store.

The run history indicates that there were problems loading some of the tab-delimited files. The individual log files for the tab-delimited files indicate that the last column of the tab-delimited file data was truncated because it exceeded the target column width.

Ensure that the tab-delimited files use end-of-line characters that are suitable for UNIX, such as a linefeed character and not the carriage return and linefeed character combination that is typically used by Windows.

Required User Permissions for the Metric Store Database (MS SQL Server)

The user account for the metric store database must be the database owner. You must use the owner user-account to log on to the Cognos 8 data source used in the Metric Package.

For information about setting user permissions, see the MS SQL Server documentation for the sp_changedbowner utility.

Error When Viewing a History Chart or Diagram on a DB2 Server with the 8.2 JDBC Driver

When the user tries to view a history chart or diagram, they see the following error:

The Cognos Gateway is unable to connect to the Cognos BI server. The server may be unavailable, or the gateway may not be correctly configured. Please try again or contact your administrator.

This problem is known to occur only when Metric Studio is installed on an HP/UX Itanium server. This problem is caused by a bug in the DB2 8.2 JDBC driver (APAR IY92903). IBM plans to fix this problem in FixPak 15.

The only workaround for this problem is to use DB2 9.1.

Oracle 9.2 Package Initialization Error if NLS_LANG Environment Variable is Not Set Appropriately Before Starting Up Cognos 8 Tomcat Server

You will encounter an exception error when trying to initialize a CMM package if the Oracle specific environment variable NLS_LANG is not set correctly.

Workaround: Cognos Series 8 requires that the Oracle specific environment variable NLS_LANG be set appropriately before starting up Cognos 8 Tomcat server. Please ensure that the character set portion of this variable is set to UTF8. For example, in the United States, this may be something like: AMERICAN_AMERICA.UTF8

Chapter 41: Troubleshooting Cognos 8 for Microsoft Office and the Report Data Service

Use this troubleshooting information to help solve problems you may encounter during or after the installation of Cognos 8 for Microsoft Office, Cognos 8 Go! Office, Cognos 8 BI Analysis *for Microsoft Excel*®, and Report Data Service (RDS) components.

For more troubleshooting information search the Knowledge Base of the Cognos Global Customer Services Web site (http://support.cognos.com/kb-app/knowledgebase).

Configuration Issues

The following issues are related to configuration and setup.

The Cognos 8 for Microsoft Office Interface Fails to Initialize in Microsoft Office

Cognos 8 for Microsoft Office may not initialize when the Microsoft .NET Framework is not installed or the version is not correct. The required Microsoft .NET Framework version is 2.0. Another possible reason for this condition is that the Cognos 8 for Microsoft Office COM add-in is either not installed or not registered.

If you are running the wrong version of Microsoft .NET Framework, uninstall it and then reinstall Microsoft .NET Framework version 2.0.

To install the Cognos 8 for Microsoft Office COM add-in, run the .msi program that is found on the installation disk. For more information, see the Cognos 8 *Installation and Configuration Guide*.

Before you attempt to install Microsoft .NET Programmability Support, you must have installed Microsoft .NET Framework version 2.0.

Cognos 8 Go! Office Does Not Start in Microsoft Word

You open a Cognos 8 Go! Office session in Microsoft Word, but nothing appears to happen.

This can occur if Microsoft Outlook has opened a session of Microsoft Word to edit email messages. To check whether you are using Word to edit emails, in Microsoft Outlook, click **Tools**, **Options**, **Mail Format**. In the **Message format** section of the dialog box, verify the options for editing your emails.

To resolve this problem, close Microsoft Outlook before opening the Microsoft Word document configured for Cognos 8 Go! Office.

Cognos 8 for Microsoft Office Fails to Initialize in Microsoft Internet Explorer

If you use Internet Explorer to browse Cognos 8 and open a workbook, document, or presentation published by Cognos 8 for Microsoft Office, the document launches in Microsoft Office, but without full functionality.

To configure Internet Explorer to open Microsoft Office files in Microsoft Office instead of in Internet Explorer, you must use the Folder Options tool to update browse options. It is also possible to do this in Windows Registry.

Steps to Configure Internet Explorer to Open Microsoft Office Documents in Microsoft Office Applications

1. Open **My Computer**.
2. From the **Tools** menu, click **Folder Options**.
3. On the **File Types** tab, under **Registered file types**, click **Microsoft Excel Worksheet**, and then click **Advanced**.

   The **Edit File Type** dialog box appears.
4. Clear the **Browse in same window** check box and click **OK**.
5. Complete the same steps for Microsoft Office PowerPoint presentations and Microsoft Office Word documents.

Microsoft Office Does Not Open a Microsoft Office Document Published from Cognos 8 for Microsoft Office

If you observe Microsoft Office trying to open a published document twice when you double-click the workbook, document, or presentation from Windows Explorer, the file association is either corrupted or not installed properly.

There are two options to resolve this issue. You can start the Microsoft Office application first, and then open the document using the Open command from the File menu, or you can reregister the file type.

Steps to Reregister Workbook File Types for Microsoft Office Excel

1. From the **Start** menu, click **Run**.
2. Type the following command and click **OK**. You can adapt this command to your environment by providing the proper local drive and location.

   "C:\Program Files\Microsoft Office\Office\Excel.Exe" /regserver

Steps to Reregister Presentation File Types for Microsoft Office PowerPoint

1. From the **Start** menu, click **Run**.

2. Type the following command and click **OK**. You can adapt this command to your environment by providing the proper local drive and location.

   "C:\Program Files\Microsoft Office\Office\Powerpnt.Exe" /regserver

Steps to Reregister Document File Types for Microsoft Office Word

1. From the **Start** menu, click **Run**.
2. Type the following command and click **OK**. You can adapt this command to your environment by providing the proper local drive and location.

   "C:\Program Files\Microsoft Office\Office\winword.exe" /regserver

Unable to Open Published Microsoft Office Documents from Cognos Connection

If the browser does not prompt you to open or save the workbook, document, or presentation, it may mean that the option to prompt before opening was cleared. This option must be reset.

You must enable the **File Download** and **Automatic prompting for file downloads** in Internet Explorer.

Steps to Confirm Opening of Documents

1. Start the **Windows Control Panel**.
2. Double-click **Folder Options**.
3. From the **Folder Types** tab, in the **Registered file types** list, click **Microsoft Excel Worksheet**, and then click **Advanced**.
4. Ensure that the **Confirm open after download** check box is selected and click **OK**.
5. Repeat steps 3 and 4 for other Microsoft Office documents that are supported in Cognos 8 for Microsoft Office, such as **Microsoft Office Excel Template**, **Microsoft PowerPoint Presentation**, **Microsoft Office PowerPoint Template**, **Microsoft Word Document**, and **Microsoft Office Word Template**.
6. Click **Close**.

Steps to Reset Internet Security Options

1. Start **Internet Explorer**.
2. From the **Tools** menu, click **Internet Options**.
3. From the **Security** tab, click the Web content zone for which you are updating these options, and then click **Custom Level**.
4. Scroll down to the **Downloads** section and click **Enable** for the **File download** and **Automatic prompting for file downloads** options.
5. Click **OK** twice.

Error Messages, the .NET shortcut, or the .NET Console Are Not in the Language of the .NET Framework 2.0 That Was Installed

When you install a non-English version of .NET Framework in a non-English operating system, you will notice that the error messages, .NET shortcut and .NET Console are in English.

To solve this issue, you must apply the .NET Framework Language Pack for your language.

The subkey numbers relate to the language as follows: 1033=en-en, 1036=fr-fr, 1031=de-de, and 1041=ja.

If you are missing the language pack subkeys, you must install the .NET language pack, which is available from the Microsoft support Web site.

Workbook Closes Unexpectedly if Name Contains Square Bracket

If you install the COM add-in and your Microsoft Excel workbook name contains a square bracket, Excel stops responding or closes unexpectedly after opening.

To resolve this problem, rename the workbook so that it does not contain any square brackets.

Reports Unavailable in Cognos Connection Jobs after Using Save As Command in Report Studio

After opening a report in Report Studio and saving a copy using the Save As command, you may find that if the report is included in a job, it is not available in the Cognos Connection portal.

Do not use the Save As command in Report Studio to save changes when a report is included in a job. Instead, make a copy of the report, make changes to the copy, and then copy the updated report to the Cognos Connection portal. Use this method to overwrite the report in the job without breaking the report links.

Processing Issues

The following issues are related to processing and rendering reports.

Cannot Render this Report

The Report Data Service (RDS) cannot bring report elements into a Microsoft Office document. Some combinations of text and images are beyond the scope of the target application.

To resolve this problem, evaluate the report and attempt to simplify the content requirements so that Cognos 8 Go! Office can render the report.

RDS Data Limit Exceeded When Importing from Large Report Outputs

While attempting to import all or part of a large report, the application attempts to open the entire report. A provisional governor limit is in place to restrict the size of report output allowed and might result in an error (even if you are trying to import only part of a report).

To resolve this problem, you can adjust the size limit for report data by changing the Governor limit setting.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change view** menu. Click **Services**, and then click **Report Data**.
5. Click the arrow next to **ReportDataService** to view the **Action** menu, and then click **Set Properties**.
6. Click the **Settings** tab.
7. In the **Value** column, change the number for **Governor limit (MB)**, and then click **OK**.

RDS Server Unavailable

The Cognos Report Data Service (RDS) manages the transfer of report data between Cognos 8 and applications that consume the data, such as Cognos 8 Go! Office.

To resolve this problem, restart RDS. RDS restarts when the Cognos 8 service is restarted.

Steps to Restart the RDS Server

1. In a browser, connect to Cognos 8 as an administrator.
2. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change View** menu. Click **Services**, and then **Report Data**.
5. With the **Report Data** service displayed, click the arrow to view the **Actions** menu next to the service, and then click **Start**.
6. If RDS fails to start, or if Cognos 8 is not responding, start Cognos Configuration.
7. Choose whether to start or restart Cognos 8.
   - If Cognos 8 is not running, click **Start**.
   - If Cognos 8 is running, click **Restart**.

Imported Reports Are Missing Charts or Images

Cognos 8 Go! Office is functioning normally, but charts and images are missing. The client machine, which is running Cognos 8 Go! Office, cannot connect to the gateway URL as configured in Cognos

8. This may be because it is behind a firewall, the hostname/DNS is not known to this client machine, or the client machine has proxy issues.

To resolve the connectivity issues, work with your system administrator.

#ERROR Appears in Cells With Multiple Images in a Cell (Excel Only)

Multiple images in a cell cannot be rendered.

The solution is to reauthor the report to move each image to its own cell, then reimport the report.

The Dispatcher Is Unable to Process the Request. The Request Is Directed to an Unknown Service Name: *Content*

The Cognos Report Data Service (RDS) cannot bring report elements into a Microsoft Office document. Some combinations of text and images are beyond the scope of the target application.

To resolve this problem, evaluate the report and attempt to simplify the content requirements so that Cognos 8 Go! Office can render the report.

Report Content is Not Imported

If the report name has a single quotation mark and the **Create new worksheets for report pages** option is selected, the report content is not imported.

To resolve this problem, you must rename the report without the single quotation mark.

Incorrect Format for the Prompt Value in Prompted Reports

When you refresh a prompted report using the **Specified Value** type, the prompt value does not display properly in the **UseValue** field.

Not all prompt values are affected. Some of the prompt properties appear as expected while others may look like this:

```
[great_outdoors_company].[Products].[Products].[Product line]->:[PC].[@MEMBER]
.[5~236]
```

In this example, the selected prompt value is "Golf Equipment" which is displayed properly in the **Display Value** prompt property.

In cases where this occurs, you must know that the equivalent format in the **Specified Value** is the value with which you want to refresh the report. In the example, [great_outdoors_company].[Products].[Products].[Product line]->:[PC].[@MEMBER].[5~236] is equivalent to Golf Equipment.

To refresh the report, we recommend that you use the **Always Prompt** option. That way, users can select the value from the report's own prompt dialog box.

Steps to Select the Always Prompt Option

1. To view the report properties, from the **Manage Data** tab, click the report.
2. Expand the prompt properties.

3. In the **Type** box, click **Always Prompt**.
4. Refresh the report.

   The report refreshes with the requested parameters.

   Note: This does not affect the import of prompted reports.

DPR-ERR-2079 Firewall Security Rejection

If you run a report after your session has expired and then try to navigate away from the first page of the report, you encounter the following error message:

```
DPR-ERR-2079 Firewall Security Rejection. Your request
was rejected by the security firewall. CAF rejection details are
available in the log. Please contact your administrator.
```

To resolve this problem, after an expired session, you must log on again.

Steps to Log On

1. In the report list, right-click the top node item.
2. Click **Log On**.
3. Provide your authentication credentials as prompted and click **OK**.

This item cannot be expanded. Microsoft Excel has reached the maximum number of rows or columns for this worksheet

The number of rows and columns is limited in Microsoft Excel. Expanding the current item is not possible because it would shift rows or columns beyond this worksheet limit. Microsoft Office Excel cannot shift nonblank cells off the worksheet.

Manually move items so that the row or column item can expand without reaching the limit, or move your exploration or analysis to another worksheet. Or, you can move the data to a new location and try again.

Security Issues

The following issues are related to security setup.

Cognos 8 for Microsoft Office Unable to Create Trust Relationship

If you are using HTTPS to RDS and you receive an error in Cognos 8 for Microsoft Office about being unable to trust the relationship, the Certificate Authority (CA) certificate that was issued by the Web server is not trusted on the client workstation.

To resolve this problem, you must ensure that the Certificate Authority (CA) that issued the Web server certificate is also trusted on the client workstation. If the certificate is not from an authority

that is already trusted on the client, such as Verisign, you must install the CA certificate in the trust store on the client.

Steps to Ensure that the CA Certificate is Trusted on the Client Workstation

1. Retrieve the CA certificate from the issuing authority.

   The file has a .cer extension. This is not the same certificate as the one used by the Web server. It is the certificate for the issuing authority itself.

2. Double-click the .cer file, click **Install Certificate**, and then click **Next**.
3. Click **Place all certificates in the following store**.
4. Click **Browse**, click **Trusted Root Certification Authorities**, and then click **Next**.
5. Click **Finish**.

Unable to View Reports After Clicking View Report

Cognos 8 Go! Office is functioning normally, but you cannot use the **View Report** option to view reports. The client machine, running Cognos 8 Go! Office, cannot connect to the gateway URL as configured in Cognos 8. It is behind a firewall, the hostname/DNS is not known to this client machine, or the client machine has proxy issues.

To resolve the connectivity issues, work with your system administrator.

Report Data Service (RDS) Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos server log, which is located at <*Cognos 8_installation_location*>/logs/cogserver.log.

RDS-ERR-1000 Report Data Service Could Not Process the Response from the Content Provider

The cause for this error varies based on the application server.

- In WebSphere, this error occurs if another XML parser, such as Xalan is colliding with the one RDS uses.
- In BEA WebLogic, this error occurs if the JAVA_OPTIONS variable has not been set with the correct parser information.
- This error can also occur if a package from a previous version of Cognos 8 (or ReportNet®) was deployed to Cognos 8 without the report specifications being upgraded.
- Another possible reason for this error message is that RDS cannot handle the report. For example, this error occurs if a Report Studio report contains a block with either of the following:
  - a repeater or repeater table inside a block or a table

- a layout object, such as a list, crosstab, chart, or text object in a conditional block inside another block or a table

Set the Class Loader Policy in WebSphere

For WebSphere, the best solution is to set the Class loader policy to **PARENT_LAST**. The WebSphere documentation tells the administrator how to do this.

Set the JAVA_OPTIONS Variable in WebLogic

If you are accessing Cognos 8 Go! Office through Cognos 8 on a BEA WebLogic Application Server add the following to the JAVA_OPTIONS variable of the startManagedWebLogic.cmd (Windows) or startManagedWebLogic.sh (UNIX) script file:

-Dorg.xml.sax.driver=org.apache.xerces.parsers.SAXParser

Upgrade Report Specifications

Follow the steps for "Upgrading Report Specifications" in the Cognos 8 *Administration and Security Guide*.

Edit the Report

To avoid problems with report layout, you must modify the report by performing one of the following:

- Take the repeater or repeater table out of the block or table.
- Cut the layout object from the conditional block into a new conditional block, block, or table.

RDS-ERR-1001 The PowerPlay Report *Name* Could Not Be Run. The Expected Response Was Not Returned by PowerPlay

PowerPlay failed while running the report or RDS cannot understand the output.

To resolve this problem, ensure that PowerPlay is functioning properly. The user should check to see that the PowerPlay server is running, or check the PowerPlay logs for errors. If IIS is being used for the Web server, ensure that Anonymous Access is enabled. For more information, see the Cognos 8 *Installation and Configuration Guide*.

RDS-ERR-1004 A Connection Could Not Be Established with Cognos 8

Cognos 8 is not responding.

Check the Cognos 8 logs. Ensure that Cognos 8 is functioning properly.

RDS-ERR-1005 The Logon Requirements for Cognos 8 Could Not Be Obtained. You May Already Be Logged into this Namespace, or the Target Namespace Does Not Exist

Generally, this error occurs when trying to log on to the same namespace twice. In some cases, it may indicate a problem with a security setup such as SiteMinder.

Ensure that you are not already logged in.

RDS-ERR-1012 Cognos Content Service was Unable to Discover the Content Providers

This error usually appears in conjunction with RDS-ERR-1028 and means that RDS could not communicate with any PowerPlay providers. (RDS-ERR-1028 can occur separately if there is more than one PowerPlay server, and only one has failed).

Check that all instances of PowerPlay Enterprise Server are running properly.

RDS-ERR-1013 Report Data Service Was Unable to Query Content Manager

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1014 Report Data Service Was Unable to Create the Document Object *Object Name*

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1015 Report Data Service Was Unable to Create a New Document Version

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1016 Report Data Service Was Unable to Create a New Document Content Object

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1018 The Cognos 8 Report *Name* Could Not Be Run. The Expected Response Was Not Returned by Cognos 8

An error was returned by Cognos 8 when the report was run. PowerPoint does not contain the necessary facilities to recreate the rich formatting and layout of this report.

Check the Cognos 8 error log for troubleshooting information. If the report in question was not able to be rendered, adjust the report to remove the formatting and layout to expose the data in PowerPoint, where formatting and layout can be modified.

RDS-ERR-1019 Cognos Content Service Was Unable to Retrieve the Portal Information from Cognos Connection

Cognos 8 may have stopped processing.

Ensure that Cognos 8 is started.

RDS-ERR-1020 The Currently Provided Credentials are Invalid. Please Provide the Logon Credentials

Your user name and password are not correct.

Ensure that you entered a valid user name and password.

RDS-ERR-1021 The Cognos 8 Report *Name* Could Not be Run Because it Contains Unanswered Prompts. Please Provide the Prompt Answers, and Run the Report Again

The report has prompts that have not been set.

You must open the report and then save a version of the report with the desired prompt answers before importing the content into Cognos 8 Go! Office.

RDS-ERR-1022 The Request Received by Report Data Service Is Not Valid

This error message could indicate that someone is trying to externally access RDS.

Stop and restart RDS.

RDS-ERR-1023 The Report *Name* Could Not Be Run Because It Exceeds the Report Data Service Data Size Limit Set by the Administrator

A report fails because it exceeds the data size limit set by the administrator. The default limit for Cognos 8 Go! Office is 10 MB.

Increase the size limit for report data by changing the Governor limit setting. For more information, see the Cognos 8 *Administration and Security Guide*.

RDS-ERR-1027 The Encoding for the PowerPlay Server *Name* Could Not Be Determined. ISO-8859-1 Will Be Used as the Encoding

This condition can be caused if PowerPlay is not responding.

Ensure that PowerPlay is started and functioning properly.

RDS-ERR-1030 A Security Error Occurred While Trying to Establish a Connection with *Name*

The CA certificate was not installed into RDS.

Install the CA certificate.

RDS-ERR-1031 Report Data Service was unable to retrieve the metadata for *Name*

The provider, such as Cognos 8 or PowerPlay is not responding.

Ensure that Cognos 8 or PowerPlay is running. Check the server log for error messages related to these providers.

RDS-ERR-1033 Report Data Service Was Unable to Create the Report View *Name*

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1034 The Report Specification for *Name* Could Not Be Retrieved From Cognos 8

This message occurs if the metadata could not be retrieved from Cognos 8.

Ensure that Cognos 8 is running. Check the server log for error messages related to Cognos 8.

RDS-ERR-1039 The Request Could Not Be Cancelled. The Request is No Longer Running

This error occurs if a user (or administrator) tries to cancel an RDS request, but the request no longer exists. This can happen if the user clicks **Cancel** after the administrator has already restarted RDS.

Wait for RDS to restart.

RDS-ERR-1040 The Conversation With *Conversation ID* Has Been Cancelled

This message appears in the audit log if a request is cancelled by either the user or by the administrator. Users can cancel their own requests. Administrators cannot cancel specific requests, but can cancel all requests by stopping and restarting the service.

Stop the service and abandon all running requests.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Status** tab, click **System**.
3. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change View** menu. Click **Services**, and then **Report Data**.
4. With the Report data service displayed, click the arrow to view the **Actions** menu next to the service, and then click **Stop immediately**.

By using this method, RDS supports canceling long running requests, such as running a report.

RDS-ERR-1044 The Output for the Requested Version for Object *Name*Could Not be Retrieved

The report output version that you want to run cannot be retrieved from the content store.

This problem can be caused by one or more of the following:

- the requested report version name, specified burst key, or burst ID, does not exist
- the requested version does not have any outputs that meet any of the accepted formats, such as XML, PDF, or HTML

  The report author did not specify a default format to be used when the report is run.
- you do not have sufficient access permissions to retrieve this output

  To run the report, you must have execute permission for the report and traverse permissions for the folder that contains the report.

RDS-ERR-1045 LayoutDataXML Output Was Not Generated For the Requested Version for Object [*Name*]

The report version you want to run exists in the content store, but was not saved with the LayoutDataXML output.

When the report output version was saved, the report author must have selected the **Enable enhanced user features in saved output version** check box in Cognos Connection.

For more information, see the Cognos 8 Cognos Connection *User Guide*.

Cognos 8 Go! Office Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos 8 Go! Office log.

COC-ERR-1003 Failed to Create Slide

You cannot add a new slide in the wizard.

Microsoft Office PowerPoint is in a state that it cannot add a slide. Exit the wizard and attempt to create a slide manually in Microsoft Office PowerPoint.

COC-ERR-1302 There Is No Data Source Available

Cognos 8 Go! Office cannot connect to the Report Data Service (RDS).

Check for connectivity issues.

COC-ERR-2005 The Import Failed

An unknown issue caused the import of report content to fail.

Other possibilities may include:

- the logon requirements for Cognos 8 are not available. You may already be logged onto this namespace, or the target namespace does not exist.
- protection for the Excel workbook structure exists

  The protection prevents users from adding or deleting worksheets or from displaying hidden worksheets.

Check that your report uses standard practices. Revise and resave the report, ensuring that text and images are not located in the same cell.

If the workbook structure is protected, ensure that the **Structure** check box in the **Protect Workbook** dialog box is cleared. In Excel, from the **Tools** menu, click **Protection**, and then click **Protect Workbook**. In the **Protect Workbook** dialog box, clear the **Structure** check box, and then click **OK**.

COC-ERR-2006 Failed to Load the Portal Tree: *Name*

This error occurs while attempting to log onto the Cognos 8 Server from a Cognos 8 Go! Office session. You must install .NET Framework v2.0.

This can be a connectivity issue. It may also mean that the Cognos 8 service has stopped.

As documented in the Cognos 8 *Installation and Configuration Guide*, to deploy Cognos 8 Go! Office, you must first install Microsoft .NET Framework version 2.0 on the client workstation.

If you have already installed the required Microsoft .NET framework, check for LAN connectivity issues. Restart the Cognos 8 service.

COC-ERR-2012 Failed to Render the List

A cell style or cell format in the Microsoft Office Excel workbook is not compatible with the data that you are attempting to import, or you are attempting to import content to a locked range.

Ensure that the range is valid and not locked, and that the style of the cell in the Microsoft Office Excel workbook is compatible with the style in Cognos 8.

COC-ERR-2013 This Is an Unsupported Office Application

Cognos 8 Go! Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003, and Microsoft Office PowerPoint XP. You cannot load Cognos 8 Go! Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

COC-ERR-2014 Refresh Failed

Cognos 8 Go! Office cannot refresh report content. Another error message should indicate why. If there is no other error message, the problem is outside Cognos 8 Go! Office. This may indicate a system problem, a server malfunction, or no LAN connectivity.

Attempt to refresh the content again. Check system and server functions.

COC-ERR-2015 Failed to Open the Import Wizard Dialog

When the Cognos 8 Go! Office Import Content wizard loads, it pages through the report and populates the tree and creates a page for each report element. If an unexpected error occurs in the report, this error is logged.

Try importing the report again. If it fails, open the report in the studio in which is was created and save the report. Check the log file for more detailed information.

COC-ERR-2019 Failed to Refresh an Image

The image could not be rendered because the Microsoft Windows Clipboard is locked.

Wait until the clipboard operation finishes. You may need to finish clipboard activity in another application before trying to refresh the content.

COC-ERR-2301 Logon Failed

Your user name and password are not correct.

Ensure that you entered a valid user name and password.

COC-ERR-2303 This Report Is Not Valid for Rendering

Cognos 8 Go! Office cannot render a top report, where a report is nested within another report.

Take the report out of its nested report and resubmit the request.

1. Redesign the report.
2. Resave the report.
3. Import the resaved report into Cognos 8 Go! Office.

COC-ERR-2304 This Is a Prompted Report. It Is Not Currently Supported

Depending on the version of Cognos 8 Go! Office and the type of report, some prompting may not be supported.

Modify the report so that prompting can take place at the same time using a prompt sheet, or try to establish defaults for the prompts based on user privileges. You can also save the report with prompt values.

Steps to Save the Report with Prompt Values

1. Using Cognos 8 or PowerPlay Web, run the report.
2. Save the report view.
3. In Cognos Connection, click **Properties** for the report view that you saved.
4. Click the **Run Options** tab.
5. Under **Prompt Values**, click **Set the prompt values**.
6. Provide the prompt answers.
7. Click **OK**.

COC-ERR-2305 Microsoft Excel Returned an Error. Ensure That Microsoft Excel is Not in Edit Mode, Then Try Again

Report content cannot be refreshed while one of the cells of the workbook is being edited.

Click outside the active cell to return it to a non-edit mode and try again.

COC-ERR-2308 Report Specification is Empty

The report you attempted to import into Cognos 8 Go! Office has no content. To import a report, it must have content.

Choose another report to import, or finish authoring the report before attempting to import it.

COC-ERR-2603 You Must Add a Slide to the Presentation Before Importing Any Content

The presentation has no slides. Cognos 8 Go! Office requires at least one slide in the presentation for the Import Content wizard to start.

Add a slide to the presentation and then try to import report content again.

COC-ERR-2604 Cannot Render Empty List Object

The list object you selected for import was empty. Cognos 8 Go! Office cannot import an empty list object.

Open the report and populate the list object with data before attempting to import the content into Cognos 8 Go! Office.

COC-ERR-2607 *Microsoft Office Message*

During initialization, you receive an error, COC-ERR-2607, and, in some instances, a Microsoft Office message, such as:

`File or assembly name Microsoft.Office.Interop.`*`ApplicationName`*`, or one of its dependencies, was not found.`

This error indicates that a required application or the .NET support for one of the required Microsoft Office applications is not installed.

Microsoft Office Excel, PowerPoint, and Word, and Microsoft .NET Programmability support for all three of these applications is required for Cognos 8 Go! Office to work properly.

Ensure that you have installed all three Microsoft Office applications and that the Microsoft .NET support is enabled. For more information, see the Cognos 8 *Installation and Configuration Guide*.

COC-ERR-2609 The Custom property "*Property_Name*" does not exist

You have imported a prompted report and have specified a name for **Custom Property** in the **Properties** pane that does not match the custom document property name in the Microsoft Office **Properties** dialog box.

In Cognos 8 Go! Office, in the **Properties** pane, for each prompt, ensure that the value specified in the **Custom Property** box, matches the value specified in the custom document property in the Microsoft Office **Properties** dialog box (**File**, **Properties**, **Custom** tab). Ensure that there are no leading and trailing character spaces in the name of the custom document property.

For more information, see the Cognos 8 Go! Office *User Guide*.

Cognos 8 for Microsoft Office Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos 8 for Microsoft Office log.

COI-ERR-2005 This Version of Microsoft Office Is Not Supported

Cognos 8 for Microsoft Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 or 2007 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 or 2007 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003 to 2007, and Microsoft Office PowerPoint XP. You cannot load Cognos Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

COI-ERR-2006 This Microsoft Office Product Is Not Supported

Cognos 8 for Microsoft Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 or 2007 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 or 2007 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003 to 2007, and Microsoft Office PowerPoint XP. You cannot load Cognos Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

COI-ERR-2008 Unable to Retrieve from Resources. Tried '{0}'

An internal processing error occurred.

Contact customer support. Be ready to supply all relevant logs and details related to this error.

COI-ERR-2009 Unable to Perform This Operation Because Microsoft Excel is in Edit Mode

Report content cannot be refreshed while one of the cells of the workbook is being edited.

Click outside the active cell to return it to a non-edit mode and try again.

COI-ERR-2010 The Name {0} is Not Valid. A Name Must Not Contain Both a Quote (") Character and an apostrophe (') character

When you create a folder, rename a folder, or publish a document, the name can contain an apostrophe or a quote, but not both.

To resolve this problem, rename the folder or document. Exclude the apostrophe or quote character from the name.

COI-ERR-2011 The server did not return the expected response. Check that the gateway is valid.

This error message is displayed if the value entered in the **System Gateway URI** box of the **Options** dialog box is not a valid Cognos 8 server.

To resolve this problem, reenter the **System Gateway URI** with the gateway address for a valid Cognos 8 server.

Cognos 8 BI Analysis *for Microsoft Excel* Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos 8 for Microsoft Office log.

COR-ERR-2002 Block Type is Not Valid

An internal processing error occurred. An exploration may have experienced an anomaly.

Reset the exploration and try to reconstruct your analysis. If the problem continues, contact customer support.

COR-ERR-2005 Block Specification is Not Valid or Missing "{0}"

An internal processing error occurred. An exploration may have experienced an anomaly.

Reset the exploration and try to reconstruct your analysis. If the problem continues, contact customer support.

COR-ERR-2006 Unexpected Type: [Stacked Block]

Cognos 8 BI Analysis for Excel was not able to render the data block in the rows and columns of the worksheet. An internal processing error occurred.

Contact customer support.

COR-ERR-2007 Error Retrieving from Resources. Tried '{0}'

The exploration experienced a bad state.

Contact customer support.

COR-ERR-2009 Name Formula is Not Valid

The COGNAME formula did not parse correctly. It may have been altered manually and may have a missing argument.

Check the COGNAME formula in the active cell and ensure that it is in the right format, or optionally, redrag the member from the source tree.

COR-ERR-2010 Formula is Not Valid

If an argument to a COGNAME or COGVAL formula references a cell and that cell does not contain the expected string formula you receive this error.

Check the cell and it dependents. Look for #REF or #VALUE in the cell. The contents of the cell may have accidentally been deleted.

COR-ERR-2011 Prompted Metadata Is Not Supported

Cognos 8 BI Analysis *for Microsoft Excel* does not support prompts. You receive this error message when a package that contains prompts loads or when selecting or expanding members in the source tree of a package with prompts.

You must choose a package that does not have prompts.

COR-ERR-2012 Unable to Load Metadata

A request was made to the Cognos 8 BI Server for metadata but it was unable to supply the requested items.

Attempt the same request in Analysis Studio or Report Studio to see if you get the same result, then contact customer support.

COR-ERR-2013 Exploration Cannot Be Converted to Formula Based Because at Least One Context Item Contains a Selection

With more than one item in the Context drop zone there is no way for the multiple items to be rendered into the cells of the worksheet.

Remove one dimension from the Context drop zone. You must have one item per dimension to convert to a formula-based analysis.

COR-ERR-2014 Due to Excel Worksheet Limitations the Results May Be Truncated

If the data that you receive back has more than 250 columns or more that 65,500 rows and you are not using Microsoft Excel 2007, the result is truncated. You receive this message to make you aware of the truncation.

To avoid this limitation, limit your data selections.

COR-ERR-2015 Exploration Cannot Be Converted to Formula Based Because There is a Default Measure and a Measure on Either Rows or Columns

Cognos 8 BI Analysis for Excel does not support the mixed case of measures.

Remove the default measure or the measure on either rows or columns.

Step

- To remove measures from an exploration, on the **Exploration** bar, Ctrl+click the **Reset to blank exploration** button.

COR-ERR-2016 Unable to Retrieve Package *Name*

After you selected a package using the Open Package dialog box, an error occurred trying to download the package from the server.

This is an internal error. You must contact Customer Support.

COR-ERR-2017 The Current Selection Did Not Return Any Data

Your selections in the source tree did not result in any data. The exploration is cleared or returned to the previous state.

To display items in the worksheet, you must select objects from the source tree that intersect on data points.

Appendix A: Round Trip Safety Configuration of Shift-JIS Characters

Shift-JIS is a character encoding system for Japanese characters. It is equivalent to ASCII, a character encoding system for English characters.

Native Encoding and Unicode

Because Shift-JIS and ASCII both define characters for one language, they are native encoding systems. Unicode is a character encoding system that defines characters for all languages. Because software is used in a global, multilingual environment, characters for processing by computers must often be converted between native encoding systems and Unicode.

Round Trip Safety

Issues associated with conversions between native encoding systems and Unicode are referred to as round trip safety issues.

Using Unicode, applications are developed that can handle input from different languages at the same time. Input data, which is entered by users or retrieved from databases, may contain characters encoded in a native encoding system. For example, in Windows, English characters input by a user are encoded using Windows-1252.

When an application receives characters in a native encoding system, it converts the characters into Unicode for processing. After the processing is finished, the characters may be converted back into the native encoding system.

In most cases, the characters are converted without ambiguity because each native character is mapped to a single Unicode character. If the conversion of a native language character to and from Unicode results in the original character, the character is considered round trip safe.

For example, the character "A" is round trip safe in Windows-1252, as follows:

- The Windows-1252 character for "A" is 0x41.
- It converts to Unicode U+0041.
- No other Windows-1252 character converts to the same Unicode character, so it always converts back to 0x41.

Issues Specific to Shift-JIS

Although the characters from most native character encoding systems are round trip safe, the Shift-JIS encoding system is an exception. Approximately 400 characters in Shift-JIS are not round trip safe because multiple characters in this group can be mapped to the same Unicode character. For example, the Shift-JIS characters 0x8790 and 0x81e0 both convert to the Unicode character U+2252.

Cognos 8 and Shift-JIS

Cognos 8 uses Unicode. The round trip safety of characters is essential to ensure the accuracy of data in generated reports.

The Round Trip Safety Configuration utility (p. 620) ensures the round trip safety of Shift-JIS characters only when it is used both to convert characters:

- from Shift-JIS to Unicode
- from Unicode to Shift-JIS

If data is requested from a database that has its own automatic mechanism for Shift-JIS to Unicode conversion, Cognos 8 does not call the Round Trip Safety Configuration utility to convert the characters from Unicode to Shift-JIS. The round trip safety of characters in the data cannot be ensured.

Example: Safe Conversion of Shift-JIS

The following example illustrates the problem with Shift-JIS conversion to Unicode:

- A database contains characters encoded in Shift-JIS.
- A record in the database contains the Shift-JIS character 0x8790.
- A user enters the Shift-JIS character 0x8790 into a data entry form in a browser.
- The application receives the input form and converts the Shift-JIS character 0x8790 to the Unicode character U+2252.
- Because the database contains Shift-JIS encoded characters, the Unicode character U+2252 cannot be specified as part of the query.
- The application must convert U+2252 back to a Shift-JIS character. Both 0x8790 and 0x81e0 convert to U+2252. If the conversion process selects 0x81e0, the query returns no records.

To resolve this problem, you can use the Round Trip Safety Configuration utility to ensure that conversion is to 0x8790 and the record is found.

The Round Trip Safety Configuration Utility

You can use the Round Trip Safety Configuration utility to configure the conversion process of Shift-JIS characters so that Cognos 8 always returns the right records.

This utility gives you control over the following two situations:

- More than one Shift-JIS character converts to the same Unicode character.

  If your data contains such Shift-JIS characters, you can use the utility to specify that the Unicode character always converts to the required Shift-JIS character (p. 621).

- More than one Unicode character represents the same or similar character after conversion.

Such Unicode characters can be considered identical when processed by computers and can be substituted for one another. You can use the utility to ensure that the correct substitution is made (p. 622).

Specify Conversions

If your data contains more than one Shift-JIS character that converts the same Unicode character, use the Round Trip Safety Configuration utility to specify that the Unicode character always converts to the required Shift-JIS character.

Conversion Tab

On this tab, native encoding characters appears in the form 0xYYYY, and Unicode characters appear in the form U+YYYY, where YYYY represents the hexadecimal value of the Unicode character.

For example, the character "A" appears as follows:

- for native encoding, 0x41
- for Unicode, U+0041

Each row represents a mapping rule that associates two or three Shift-JIS characters with the Unicode character in the first column.

By default, all Shift-JIS characters in a row are converted to the associated Unicode character. For example, the Shift-JIS characters 0x8782 and 0xFA59 both convert to the Unicode character U+2116.

You can configure more than one character at a time.

Prerequisite

Before you choose the Shift-JIS character to use in a conversion, determine which Shift-JIS character is currently used in the environment. Only one of the possible Shift-JIS equivalents of a Unicode character can be used in a specific environment.

Steps

1. Start the Round Trip Safety Configuration utility in the *c8_location*/ bin:
   - for Windows, rtsconfig.exe
   - for UNIX, rtsconfig
2. Click the **Conversion** tab.

   Tip: To see the glyph next to the Unicode character, from the **View** menu, click **Glyphs**. Depending on the type and size of fonts you use, some glyphs may not be visible.
3. From the **Edit** menu, click **Find a character,** and then enter the hexadecimal value of the Shift-JIS character.
4. Click **OK**.

5. In the **First Shift-JIS Character**, **Second Shift-JIS Character**, or **Third-Shift-JIS Character** column, select the Shift-JIS character that you want the Unicode character to convert to.
6. Repeat steps 3 to 5 for each Shift-JIS character that you want to configure.
7. Save your specifications using one of the following methods:
   - To only save your specifications, from the **File** menu, click **Save**.
   - To save and apply your specifications, from the **Tools** menu, click **Configure**.

   If you save only, you can apply your specification later (p. 623). You can also restore default settings (p. 623).

   The specifications are saved in the file shift-jis.xml in the *c8_location*/bin directory.

Specify Substitutions

After the conversion, the Unicode data may contain characters that are identical in meaning, but different in appearance. For example, a full-width tilde (~) and a half-width tilde have different values in Unicode, but can be considered identical during processing.

You can use the Round Trip Safety Configuration utility to specify that specific pairs of similar characters be substituted by a single character. For example, you can specify that both widths of tilde are substituted by a full-width tilde.

Substitution Tab

On this tab, the first column contains pairs of characters that generally mean the same thing, but are represented by different values in Unicode. Each row represents a substitution rule. The first column lists the data before conversion. The second column lists the possible replacement characters.

Steps

1. Start the Round Trip Safety Configuration utility in the *c8_location*/ bin:
   - for Windows, rtsconfig.exe
   - for UNIX, rtsconfig
2. Click the **Substitution** tab.

   Tip: To see the glyph next to the Unicode character, from the **View** menu, click **Glyphs**. Depending on the type and size of fonts you use, some glyphs may not be visible.
3. In the **Original Code** column, click the character that you want to substitute.
4. In the **Substitute Code** column, click the equivalent character.

   A list of possible substitution options appears.
5. In the list, click the Unicode character that you want to use, or click **Do not substitute**.
6. Repeat steps 3 to 5 for each Unicode character that you want to substitute.
7. Save your specifications using one of the following methods:

- To only save your specifications, from the **File** menu, click **Save**.
- To save and apply your specifications, from the **Tools** menu, click **Configure**.

If you only save, you can apply your specification later (p. 621). You can also restore default settings (p. 623).

The specifications are saved in the file shift-jis.xml in the *c8_location*/bin directory.

Apply the Conversions and Substitutions

If you do not apply changes when you save, you can apply the data later. Based on information saved in the file *c8_location*/bin/shift-jis.xml, two files are generated:

- for substitution data, i18n_res.xml
- for conversion data, ibm-943_P14A-2000.cnv

When you apply the data, by default, characters are not checked for round trip safety. When you set the configuration mode, you may choose to check for round trip safety by selecting the option that returns a conversion error at run time for characters that are not round trip safe. This can be useful to initially detect which Shift-JIS characters must be configured.

Steps

1. Stop Cognos 8.
2. In the Round Trip Safety Configuration utility, from the **Tools** menu, click **Set the configuration mode**.
3. Specify whether you want characters checked for round trip safety.
4. From the **Tools** menu, click **Configure**.
5. Start Cognos 8.

Restore the Default Conversion Settings

At any time, you can quickly restore the default settings in your configuration and substitution data. For example, you may want to restore the configuration in the following situations:

- after your application is set to use a different data source that requires a different configuration
- after prototyping

Steps

1. Stop Cognos 8.
2. In the Round Trip Safety Configuration utility, from the **Tools** menu, click **Restore defaults**.

   The conversion process is set to use the default values.
3. Start Cognos 8.

Specify Conversions for Series 7 PowerPlay Web Reports

Cognos Series 7 supplies a limited solution for the Japanese Vendor Defined Characters (VDC) in Shift-JIS encoding. To ensure data integrity and consistency when using PowerPlay Web reports with Cognos 8, you must set the character mapping to default values.

Steps

1. Stop Cognos 8.
2. Start the Round Trip Safety Configuration utility (p. 620).
3. From the **Tools** menu, click **Restore defaults**.
4. From the **Tools** menu, click **Configure**.

   The conversion tables are set to use the default values in the background.
5. Close the Round Trip Safety Configuration utility.
6. Start Cognos 8.

Appendix B: Initial Access Permissions

When Content Manager initializes a content store, it creates basic structures and security information. We recommend that you modify these initial settings to secure Cognos 8 (p. 207).

The following icons are used to indicate the access permissions. For more information, see "Access Permissions" (p. 191).

Icon	Permissions
	Read
	Write
	Execute
	Set policy
	Traverse

Content Manager Hierarchy of Objects

The following table shows the Content Manager hierarchy of objects and their contents.

Folder	Contents
/Root	All folders below /Root in the hierarchy.
/Root/Directory	Information about authentication providers and other information typically found in a directory service.
/Root/Directory/Cognos	The Cognos directory namespace containing Cognos groups, data sources, distribution lists, and contacts.
/Root/Directory/*third-party providers*	Third-party security namespaces, such as NTLM, LDAP, and Active Directory.

Folder	Contents
/Root/Public Folders	All application data in Content Manager.
/Root/Directory/*application packages*	A separate folder for each application containing information about the application.
/Root/Configuration	Configuration data for all Cognos 8 components and templates.
/Root/Capabilities	Objects that can be secured through policies that restrict access to functionality, such as Administration, Report Studio, and Query Studio; and to features, such as user defined SQL, and bursting.
/Root/Import	Deployment information for each archive imported into Content Manager.
/Root/Export	Deployment information for each archive exported from Content Manager.

The Root Object

Object	Group, role, or account					
Root	Everyone	✔		✔		✔

Top-level Content Manager Objects

Object	Group, role, or account					
Capabilities	Directory Administrators				✔	✔
	Everyone					✔
Configuration	Server Administrators	✔	✔	✔	✔	✔
	Everyone			✔		✔
Public Folders	Report Administrators	✔	✔	✔	✔	✔

Object	Group, role, or account					
	Authors	✔	✔	✔		✔
	Query Users	✔		✔		✔
	Consumers	✔		✔		✔
	Express Authors	✔	✔	✔		✔
	Readers		✔			✔
Export	Report Administrators	✔	✔	✔	✔	✔
Import	Report Administrators	✔	✔	✔	✔	✔
Directory	Everyone					✔

Capabilities

Object	Group, role, or account					
Administration	Directory Administrators			✔	✔	✔
	Portal Administrators			✔		✔
	Report Administrators			✔		✔
	Server Administrators			✔		✔
	Metrics Administrators			✔		✔
	Planning Rights Administrators			✔		✔
	Controller Administrators			✔		✔

Object	Group, role, or account					
Administration/Run activities and schedules	Report Administrators			✔		✔
	Metrics Administrators			✔		✔
	Controller Administrators			✔		✔
	Directory Administrators				✔	✔
Administration/Configure and Manage the system	Server Administrators			✔		✔
	Directory Administrators				✔	✔
Administration/Users, Groups, Roles	Directory Administrators			✔	✔	✔
Administration/Set capabilities and manage UI profiles	Directory Administrators			✔	✔	✔
Administration/Data Sources Connections	Directory Administrators			✔	✔	✔
Administration/Administration tasks	Server Administrators			✔		✔
	Report Administrators			✔		✔
	Metrics Administrators			✔		✔
	Controller Administrators			✔		✔
	Directory Administrators				✔	✔

Object	Group, role, or account					
Administration/Distribution Lists and Contacts	Directory Administrators			✔	✔	✔
Administration/Printers	Directory Administrators			✔	✔	✔
Administration/Metric Studio Administration	Metrics Administrators			✔		✔
	Directory Administrators				✔	✔
Administration/Planning Administration	Planning Rights Administrators			✔		✔
	Directory Administrators				✔	✔
Administration/Styles and portlets	Portal Administrators			✔		✔
	Directory Administrators				✔	✔
Administration/Controller Administration	Controller Administrators			✔		✔
	Directory Administrators				✔	✔
Analysis Studio	Report Administrators			✔		✔
	Authors			✔		✔
	Analysis Users			✔		✔
	Directory Administrators				✔	✔

Object	Group, role, or account					
Cognos Viewer Context Menu Selection Toolbar	Report Administrators			✔		✔
	Authors			✔		✔
	Consumers			✔		✔
	Query Users			✔		✔
	Analysis Users			✔		✔
	Readers			✔		✔
	Express Authors			✔		✔
	Directory Administrators				✔	✔
Cognos Viewer/Run With Options	Report Administrators			✔		✔
	Authors			✔		✔
	Consumers			✔		✔
	Query Users			✔		✔
	Analysis Users			✔		✔
	Express Authors			✔		✔
	Directory Administrators				✔	✔
Conditional Subscriptions	Report Administrators			✔		✔
	Authors			✔		✔
	Query Users			✔		✔

Object	Group, role, or account					
	Consumers			✔		✔
	Metrics Administrators			✔		✔
	Metrics Authors			✔		✔
	Controller Administrators			✔		✔
	Controller Users			✔		✔
	Analysis Users			✔		✔
	Express Authors			✔		✔
	Directory Administrators				✔	✔
Controller Studio	Controller Users			✔		✔
	Controller Administrators			✔		✔
	Directory Administrators				✔	✔
Data Manager	Data Manager Authors			✔		✔
	Directory Administrators				✔	✔
Detailed Errors	Directory Administrators				✔	✔
Drill Through Assistant	Directory Administrators				✔	✔
Event Studio	Report Administrators			✔		✔
	Authors			✔		✔

Object	Group, role, or account					
	Metrics Administrators			✔		✔
	Metrics Authors			✔		✔
	Directory Administrators				✔	✔
Metric Studio	Metrics Administrators			✔		✔
	Metrics Users			✔		✔
	Metrics Authors			✔		✔
	Directory Administrators				✔	✔
Metric Studio/Edit View	Metrics Administrators			✔		✔
	Metrics Authors			✔		✔
	Directory Administrators				✔	✔
Planning Contributor	Planning Contributor Users			✔		✔
	Planning Rights Administrators			✔		✔
	Directory Administrators				✔	✔
Query Studio Create Advanced	Authors			✔		✔
	Query Users			✔		✔

Object	Group, role, or account					
	Report Administrators			✔		✔
	Directory Administrators				✔	✔
Report Studio	Authors			✔		✔
	Report Administrators			✔		✔
	Directory Administrators				✔	✔
	Express Authors			✔		✔
Report Studio Bursting HTML items in report User Defined SQL	Authors			✔		✔
	Report Administrators			✔		✔
	Directory Administrators				✔	✔
Report Studio Create/Delete	Authors			✔		✔
	Report Administrators			✔		✔
	Directory Administrators				✔	✔
	Express Authors			✔		✔
Scheduling	Report Administrators			✔		✔

Object	Group, role, or account					
	Authors			✔		✔
	Consumers			✔		✔
	Query Users			✔		✔
	Metrics Administrators			✔		✔
	Metrics Authors			✔		✔
	Controller Administrators			✔		✔
	Controller Users			✔		✔
	Analysis Users			✔		✔
	Directory Administrators				✔	✔
	Express Authors			✔		✔
Scheduling/Scheduling Priority	Report Administrators			✔		✔
	Metrics Administrators			✔		✔
	Controller Administrators			✔		✔
	Directory Administrators				✔	✔
Specification Execution	Data Manager Authors			✔		✔
	Directory Administrators				✔	✔

The Cognos Namespace

Object	Group, role, or account	✔	✔		✔	✔
Cognos	Everyone	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔

Built-in and Predefined Objects in the Cognos Namespace

Object	Group, role, or account					
All Authenticated Users	All Authenticated Users	✔		✔		✔
Analysis Users	All Authenticated Users	✔				✔
	Analysis Users	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Anonymous	Anonymous	✔		✔		✔
	Everyone	✔				✔
	Directory Administrators	✔	✔	✔	✔	✔
Authors	All Authenticated Users	✔				✔
	Authors	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Consumers	All Authenticated Users	✔				✔
	Consumers	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔

Object	Group, role, or account					
Controller Administrators	Controller Administrators			✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Controller Users	All Authenticated Users	✔				✔
	Controller Users	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Data Manager Authors	All Authenticated Users	✔				✔
	Data Manager Authors	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Directory Administrators	Directory Administrators	✔	✔	✔	✔	✔
Express Authors	Directory Administrators	✔	✔	✔	✔	✔
	Express Authors	✔		✔		✔
	All Authenticated Users	✔				✔
Everyone	All Authenticated Users	✔		✔		✔
	Anonymous			✔		
Metrics Administrators	Metrics Administrators			✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Metrics Authors	Metrics Authors	✔		✔		✔
	All Authenticated Users	✔				✔

Object	Group, role, or account					
	Directory Administrators	✔	✔	✔	✔	✔
Metrics Users	Metrics Users	✔		✔		✔
	All Authenticated Users	✔				✔
	Directory Administrators	✔	✔	✔	✔	✔
Planning Contributor Users	All Authenticated Users	✔				✔
	Planning Contributor Users	✔		✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Planning Rights Administrators	Planning Rights Administrators			✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Portal Administrators	Portal Administrators			✔		✔
	Directory Administrators	✔	✔	✔	✔	✔
Query Users	All Authenticated Users	✔				✔
	Directory Administrators	✔	✔	✔	✔	✔
	Query Users	✔		✔		✔
Readers	Directory Administrators	✔	✔	✔	✔	✔
	Readers	✔		✔		✔
	All Authenticated Users	✔				✔

Object	Group, role, or account					
Report Administrators	Directory Administrators	✔	✔	✔	✔	✔
	Report Administrators			✔		✔
Server Administrators	Directory Administrators	✔	✔	✔	✔	✔
	Server Administrators			✔		✔
System Administrators	System Administrators	✔	✔	✔	✔	✔

Appendix C: Localization of Samples Databases

The samples databases provided with Cognos 8 store a selection of text fields, such as names and descriptions, in 23 languages to demonstrate a multilingual reporting environment. This appendix provides information about how data is stored in the samples databases and how the samples databases are set up to use multilingual data, including:

- one column per language (p. 639)
- one row per language (p. 640)
- transliterations and multiscript extensions for Asian languages (p. 641)

For more information on the samples, see "Setting Up the Samples" (p. 56).

One Column Per Language

In this structure, tables contain sets of 23 columns, one for each language. A logical naming convention is used to indicate which language a column contains. The name of each column ends with a language code suffix, such as _EN for English and _FR for French. For example, the column that contains information about countries is named COUNTRY_FR for French data and COUNTRY_DE for German data. All tables use this structure except for PRODUCT_LOOKUP

Determining the Language (Columns) in the Model

In Framework Manager, you can insert a macro in the SQL of the data source query subject to return a specific column of data. The query subject uses the macro to apply the locale setting and to return a language code. The locale specifies linguistic information and cultural conventions for character type, collation, format of date and time, currency unit, and messages.

The macro, runLocale, uses a parameter map to convert the user's desired content language into a complete or partial column name. This column name is then substituted in the SQL before the query runs.

Because the samples databases use a language code as the suffix for the column name, the macro uses a parameter map to convert valid run locales into a language code and then concatenates the language code to the base column name.

Sample Query

The macro in the following sample query uses the runLocale session variable as the Language_lookup parameter map key. It returns the language code to be used as the suffix of the column name. In the following Select statement, where French is the language, the macro generates the column name COUNTRY_FR.

```
Select
COUNTRY.COUNTRY_CODE,
#'COUNTRY.COUNTRY_' + $Language_lookup{$runLocale}# as
```

```
Product_Line
from
[great_outdoors].COUNTRY
```

Because Framework Manager is flexible, your multilingual columns do not have to use the naming system used in the samples. In fact, your multilingual columns can use any naming system. You can encode your naming scheme into the parameter map, as required. You can use any session variable as the parameter map key and return any SQL syntax that you require to substitute at run-time. For more information, see the Framework Manager *User Guide*.

One Row Per Language

In this structure, each string value has a separate row with a code column that identifies the language. Data is filtered to return only the row that contains the required language data.

Normally, multilingual data is stored in a separate table to avoid duplicating non-descriptive or monolingual data.

In the samples databases, the data table contains the primary key and monolingual data, such as date information. The multilingual table contains data and a compound key composed of the foreign key and language code. For example, the PRODUCT_NAME_LOOKUP table contains the PRODUCT_NUMBER, PRODUCT_LANGUAGE, and PRODUCT_NAME columns, where PRODUCT_NUMBER and PRODUCT LANGUAGE form the primary key. Each of the localized items is expressed in 23 rows, one for each language.

The following foreign key table contains one or more localized items.

Primary key table	Foreign key table	Database
PRODUCT	PRODUCT_NAME_LOOKUP	GOSALES
SLS PRODUCT DIM	SLS_PRODUCT_LOOKUP	GOSALESDW

The samples databases use ISO language codes to identify each row of data.

Determining the Language (Rows) in the Model

In Framework Manager, you can insert a macro in the SQL of the data source query subject to return a specific row of data. The query subject uses the macro to apply the locale setting and to return a language code.

Sample Query

The macro in the sample query below uses the runLocale session variable as the Language_lookup parameter map key and returns the corresponding language code. The sq() function specifies that the return value of the macro be enclosed in single quotation marks to produce a valid SQL filter predicate. In the following Select statement, where German is the language, the macro identifies the language as DE (German), and product the filter (PRODUCT_MULTILINGUAL."LANGUAGE" = 'DE').

```
Select
P.INTRODUCTION_DATE,
P.PRODUCT_TYPE_CODE,
P.PRODUCTION_COST,
P.MARGIN,
PRODUCT_LOOKUP.PRODUCT_NUMBER as PRODUCT_NUMBER1,
PRODUCT_LOOKUP."PRODUCT_LANGUAGE",
PRODUCT_LOOKUP.PRODUCT_NAME,
PRODUCT_LOOKUP.PRODUCT_DESCRIPTION
From
gosales].PRODUCT as P,
[gosales].PRODUCT_LOOKUP
Where
P.PRODUCT_NUMBER = PRODUCT_LOOKUP.PRODUCT_NUMBER
and
(PRODUCT_LOOKUP."PRODUCT_LANGUAGE" = #sq($Language_lookup{$runLocale})#)
```

Transliterations and Multiscript Extensions

For transliteration of Asian languages, a table contains two columns with equivalent information. One column shows string values using only Latin characters. The other column shows string values using both Asian and Latin characters. The naming convention is to add the suffix _MB.

In the Latin-only columns, transliteration defines the phonetic equivalent of the value defined in the _MB column.

The following tables include columns that contain transliterated values.

Table	Database
ORDER_HEADER	GOSALES
RETAILER	GOSALESs
RETAILER_SITE _MB	GOSALES
BRANCH	GOSALES
EMPLOYEE	GOSALES

Transliterations in the Model

The following example creates a single data source, based on a query subject of two tables. The tables are identical except for the use of Asian characters in one table.

Column with names that end with the suffix _MB store Asian-related data using Asian characters, such as Chinese ideograms. This removes some duplication and makes it easier to define relationships to other query subjects in the model.

```
Select
RS.RTL_RETAILER_SITE_CODE,
RS.RTL_RETAILER_CODE,
RS.RTL_ADDRESS1,
RS.RTL_ADDRESS2,
```

```
RS.RTL_CITY,
RS.RTL_REGION,
RS.RTL_POSTAL_ZONE,
RS.RTL_COUNTRY_CODE,
RS.RTL_ACTIVITY_STATUS_CODE,
RS_MB.RTL_ADDRESS1 as Address1_MB,
RS_MB.RTL_ADDRESS2 as Address2_MB,
RS_MB.RTL_CITY as City_MB,
RS_MB.RTL_REGION as Region_MB
from
[goretailers].RETAILER_SITE as RS,
[goretailers].RETAILER_SITE_MB
as RS_MB
where
RETAILER_SITE.RETAILER_SITE_CODE = RETAILER_SITE_MB.RETAILER_SITE_CODE
```

Multiscript Extensions

After defining the query subjects in the model, items with the _MB extension are renamed with a multiscript extension, such as Address 1 (multiscript) to ease use and readability.

Using Multiscript Extensions for Conditional Formatting

An example of multiscript usage is a mailing address in which the multiscript values ensure that mailing labels are formatted for local handling and delivery.

To add more value to mailing labels, the GO Sales and Retailers model applies conditional formatting to generate international address formats.

In the following example, Address line 3 is the name of a user-defined calculation that is used to generate line three of a mailing label. The expression uses a Country code value to specify how to format the line.

```
if ([Retailers].[Retailer
site].[Country code] = 6) then
(' ' + [Retailers].[Retailer
site].[Address 1 (multiscript)])
else
if ([Retailers].[Retailer site].[Country
code] = 8) then
([Retailers].[Retailer site].[Address
2 (multiscript)])
else
if ([Retailers].[Retailer site].[Country
code] = 13) then
([Retailers].[Retailer site].[Region
(multiscript)] + ' ' + [Retailers].[Retailer
site].[City (multiscript)]
+ ' ' + [Retailers].[Retailer
site].[Address 1 (multiscript)] + '
' + [Retailers].[Retailer site].[Address
2 (multiscript)])
else
if ([Retailers].[Retailer site].[Country
code] = 14) then
([Retailers].[Retailer site].[Address
2 (multiscript)])
else
([Retailers].[Retailer site].[Address
1 (multiscript)])
```

Multiscript extensions allow a user in any language to use the same model columns to create an address block and see the address properly formatted for each delivery location. For more information, see the Mailing address data source query subjects in the gosales_goretailers sample model.

Appendix D: User Interface Elements Reference List

This appendix shows the Cognos Connection user interface elements that you can hide and add.

Elements You Can Hide

The following table describes the user interface elements that you can hide in Cognos Connection. Items starting with CRN and CC indicate Cognos Connection interface elements. Items starting with RV indicate Cognos Viewer elements. Items starting with SMT indicate Schedule Management Tool elements.

For information about hiding elements, see "Hide User Interface Elements" (p. 461).

User Interface Element	Description
<CRN_HEADER/>	The Cognos Connection top header (h1)
<CRN_HEADER_TITLE/>	Left-hand side of the Cognos Connection top header (h1)
<CRN_HEADER_OPTIONS/>	Right-hand side of the Cognos Connection top header (h1)
<CRN_HEADER_USERNAME/>	Not supported
<CRN_HEADER_AUTHENTICATION/>	Authentication options
<CRN_HEADER_REFRESH/>	Refresh button
<CRN_HEADER_SEARCH/>	Search options
<CRN_HEADER_PERSONAL/>	My Area options
<CRN_HEADER_PERSONAL_subscriptions/>	Subscriptions option in My Area
<CRN_HEADER_PERSONAL_preferences/>	Preferences option in My Area
<CRN_HEADER_PERSONAL_activities/>	Activities option in My Area
<CRN_HEADER_HELP/>	Help menu

User Interface Element	Description
<CRN_HEADER_HELP_quickTour/>	Quick Tour link
<CRN_HEADER_HELP_getStarted/>	Get ting Started link
<CRN_HEADER_HELP_moreDocs/>	More documentation link
<CRN_HEADER_HELP_companyWebsite/>	Cognos website link
<CRN_HEADER_HELP_welcome/>	Welcome screen link
<CRN_HEADER_HELP_about/>	About link
<CRN_HEADER_HOME/>	Home link
<CRN_HEADER_HOME_setHome/>	Set as home option
<CRN_HEADER_OPTIONS_mypages/>	Deprecated
<CRN_HEADER_OPTIONS_rs/>	Report Studio link
<CRN_HEADER_OPTIONS_qs/>	Query Studio link
<CRN_HEADER_OPTIONS_mm/>	Metric Studio link
<CRN_HEADER_OPTIONS_es/>	Event Studio link. Used to be <CRN_HEADER_OPTIONS_ags>
<CRN_HEADER_OPTIONS_as/>	Analysis Studio link. Used to be <CRN_HEADER_OPTIONS_ps>
<CRN_HEADER_OPTIONS_cc/>	Cognos Connection link (Cognos Viewer only). Deprecated.
<CRN_HEADER_OPTIONS_pc/>	Contributor link
<CRN_HEADER_OPTIONS_cs/>	Controller Studio
<CRN_HEADER_OPTIONS_dt/>	Drill Through
<CC_HEADER/>	Cognos Connection header (h2). Deprecated
<CC_HEADER_TITLE/>	Left-hand side of the Cognos Connection header (h2). Deprecated

User Interface Element	Description
<CC_HEADER_MENU/>	Right-hand side of the Cognos Connection header (h2). Deprecated
<CC_HEADER_MENU_home/>	"home" link. Replaced by <CRN_HEADER_HOME/>
<CC_HEADER_MENU_return/>	"return" link (Cognos Viewer only)
<CC_HEADER_MENU_search/>	"search" link
<CC_HEADER_MENU_logon/>	"logon" link
<CC_HEADER_MENU_logoff/>	"logoff" link
<CC_HEADER_MENU_about/>	"about" link (Cognos Viewer only). Replaced by <CRN_HEADER_HELP_about/>
<CC_HEADER_MENU_help/>	"help" link
<CC_HEADER_MENU_preferences/>	"preferences" link
<CC_VIEW_TOOLS/>	"tools" link. Deprecated
<CC_VIEW_TOOLS_directory/>	"directory" link. Deprecated
<CC_VIEW_TOOLS_capabilities/>	"capabilities" link. Deprecated
<CC_VIEW_TOOLS_schedule/>	"schedule" link. Deprecated
<CC_VIEW_TOOLS_administration/>	"server administration" link. Deprecated
<CC_VIEW_TOOLS_deployment/>	Deprecated
<CC_VIEW_TOOLS_csadministration/>	"content administration" link. Deprecated
<CC_VIEW_TOOLS_portal/>	"portal administration" link. Deprecated
<CC_VIEW_TOOLS_drillthru/>	"drill-through definition" link
<CC_VIEW_TOOLS_preferences/>	"my preferences" link
<CC_VIEW/>	Cognos Connection header (h3)

User Interface Element	Description
<CC_VIEW_TABS/>	Left-hand side of the Cognos Connection header (h3) that includes the tabs
<CC_VIEW_TABS_OPTIONS/>	The page menu button on left-hand side of the portal tabs
<CC_TOOLBAR/>	Cognos Connection header (h4) that includes the path navigation and toolbar
<CC_TOOLBAR_PATH/>	Path navigation
<CC_TOOLBAR_BUTTONS/>	Toolbar buttons
<CC_TOOLBAR_BUTTONS_refreshUsingGet/>	Refresh
<CC_TOOLBAR_BUTTONS_newjobDefinition/>	New Job
<CC_TOOLBAR_BUTTONS_newfolder/>	New Folder
<CC_TOOLBAR_BUTTONS_newURL/>	New URL
CC_TOOLBAR_BUTTONS_newconfigurationFolder/>	New Configuration Folder
<CC_TOOLBAR_BUTTONS_newrole/>	New Role
<CC_TOOLBAR_BUTTONS_newgroup/>	New Group
<CC_TOOLBAR_BUTTONS_newnamespaceFolder/>	New Namespace Folder
<CC_TOOLBAR_BUTTONS_newdataSource/>	New Data Source
<CC_TOOLBAR_BUTTONS_newdataSourceConnection/>	New Connection
<CC_TOOLBAR_BUTTONS_newdataSourceSignon/>	New Data Source Signon
<CC_TOOLBAR_BUTTONS_newcontact/>	New Contact
<CC_TOOLBAR_BUTTONS_newdistributionList/>	New Distribution List
<CC_TOOLBAR_BUTTONS_newprinter/>	New Printer

User Interface Element	Description
<CC_TOOLBAR_BUTTONS_newadminFolder/>	New Admin Folder
<CC_TOOLBAR_BUTTONS_newportletFolder/>	New Portlet Folder
<CC_TOOLBAR_BUTTONS_newcontentTask/>	New Content Task
<CC_TOOLBAR_BUTTONS_newcmmSystemTask/>	New CognosMetrics Manager task
<CC_TOOLBAR_BUTTONS_newimportDeploymentFolder/>	New import deployment folder
<CC_TOOLBAR_BUTTONS_newexportDeploymentFolder/>	New export deployment folder
<CC_TOOLBAR_BUTTONS_import/>	New import specification
<CC_TOOLBAR_BUTTONS_export/>	New export Specification
<CC_TOOLBAR_BUTTONS_cut/>	Cut
<CC_TOOLBAR_BUTTONS_copy/>	Copy
<CC_TOOLBAR_BUTTONS_paste/>	Paste
<CC_TOOLBAR_BUTTONS_delete/>	Delete
<CC_TOOLBAR_BUTTONS_refresh/>	Refresh
<CC_TOOLBAR_BUTTONS_selectall/>	Select all
<CC_TOOLBAR_BUTTONS_deselectall/>	Deselect All
<CC_TOOLBAR_BUTTONS_list/>	List view mode
<CC_TOOLBAR_BUTTONS_detail/>	Detailed view mode
<CC_TOOLBAR_BUTTONS_properties/>	Current folder properties
<CC_TOOLBAR_BUTTONS_configuration_properties/>	Configuration folder properties
<CC_TOOLBAR_BUTTONS_order/>	Order

User Interface Element	Description
<CC_TOOLBAR_BUTTONS_deployment_properties/>	Deployment Properties
<CC_TOOLBAR_BUTTONS_enable_sched/>	Enable Schedule
<CC_TOOLBAR_BUTTONS_disable_sched/>	Disable Schedule
<CC_TOOLBAR_BUTTONS_view_events/>	View Events
<CC_TOOLBAR_BUTTONS_page_sizes/>	Page sizes option in configuration tool
<CC_TOOLBAR_BUTTONS_search/>	Search
<CC_TOOLBAR_BUTTONS_add_portet/>	Add a portlet to custom portal pages
<CC_TOOLBAR_BUTTONS_edit_layout/>	Edit the layout of a custom portal page
<CC_TOOLBAR_BUTTONS_new_page/>	Add a custom portal page
<CC_TOOLBAR_BUTTONS_delete_page/>	Delete a custom portal page
<CC_TOOLBAR_BUTTONS_newmetricsIntegrationTaskGroup/>	New data integration task
<CC_TOOLBAR_BUTTONS_newmetricsPackage/>	New metrics package
<CC_DIALOG_HEADER/>	Not supported
<CC_DIALOG_HEADER_help/>	"Help" link on dialog screens
<CC_RUN_OPTIONS_email_attachment/>	"Include the report" check box
<RV_HEADER/>	Cognos Viewer header
<RV_HEADER_TITLE/>	Left hand side of the Cognos Viewer header
<RV_HEADER_MENU/>	Right hand side of the Cognos Viewer header
<RV_HEADER_MENU_logoff/>	"log off" link
<RV_HEADER_MENU_logon/>	"logon" link
<RV_HEADER_MENU_return/>	"return" link

User Interface Element	Description
<RV_HEADER_MENU_about/>	"about" link
<RV_HEADER_MENU_home/>	"home link
<RV_TOOLBAR/>	Not applicable
<RV_TOOLBAR_BUTTONS/>	Toolbar options in Cognos Viewer
<RV_TOOLBAR_BUTTONS_Download/>	Download toolbar button. Applies when download is enabled.
<RV_TOOLBAR_BUTTONS_Save/>	Save toolbar button
<RV_TOOLBAR_BUTTONS_SaveAs/>	Save As toolbar button
<RV_TOOLBAR_BUTTONS_Send/>	Email toolbar button
<RV_TOOLBAR_BUTTONS_History/>	History toolbar option
<RV_TOOLBAR_BUTTONS_Run/>	Run toolbar button
<RV_TOOLBAR_BUTTONS_HTML/>	HTML format view button
<RV_TOOLBAR_BUTTONS_PDF/>	PDF format view button
<RV_TOOLBAR_BUTTONS_XLS/>	XLS format view button
<RV_TOOLBAR_BUTTONS_XLS_CSV/>	CSV format view button
<RV_TOOLBAR_BUTTONS_XML/>	XML format view button
<RV_TOOLBAR_BUTTONS_XLS_SPREADSHEETML/>	Excel 2007 format view
<RV_TOOLBAR_BUTTONS_XLS_XLWA/>	Excel 2002 format view
<RV_TOOLBAR_BUTTONS_XLS_XLS/>	Excel 2000 format view
<RV_TOOLBAR_BUTTONS_XLS_SingleXLS/>	Excel 2000 single sheet format view
<RV_TOOLBAR_BUTTONS_DrillDown/>	Hides the drill down button
<RV_TOOLBAR_BUTTONS_DrillUp/>	Hides the drill up button
<RV_TOOLBAR_BUTTONS_GoTo/>	Hides the go to button

User Interface Element	Description
`<SMT_SCOPE_any/>`	'Any' choice from the Scope selection in the Schedule Management tool.
`<SMT_SCOPE_entries_i_own/>`	'Entries I Own' choice from the Scope selection in the Schedule Management tool.
`<SMT_SCOPE_public_folders/>`	'Public Folders' choice from the Scope selection in the Schedule Management tool.

Elements You Can Add

The following table describes the user interface elements that can be added to Cognos Connection. For information about hiding these elements, see"Hide User Interface Elements" (p. 461).

User Interface Element	Description

`<CRN_HEADER_OPTIONS>`
` <item show="user_type">`
`  <url>`
`  http-encoded URL to execute`
`  </url>`
`  <onclick>other action to take when link is clicked`
`  </onclick>`
`  <target>browser window to target`
`  </target>`
`  <label xml:lang="en">link text`
`</label>`
`  <tooltip xml:lang="en">tooltip text`
 	
`</tooltip>`
`  <label xml:lang="language">link text`
 	
`</label>`
`  <tooltip xml:lang="language">`
`tooltip text`
`  </tooltip>`
`  <icon>icon to show for this element`
 	
`</icon>`
` </item>`
`</CRN_HEADER_OPTIONS>`
	Renders additional options to the right hand side of the Cognos 8 header to the right of the **Report Studio** link.
	Only a url, an icon, and a tooltip and label in English are required.
	Target can be one of _blank, _self, _parent, or _top.

User Interface Element	Description
<CC_HEADER_MENU> <item show="user_type"> <url>*http-encoded URL to execute* </url> <onclick>*other action to take when link is clicked* </onclick> <target>*browser window to target* </target> <label xml:lang="en">*link text* </label> </item> </CC_HEADER_MENU>	Renders additional options on the right hand side of the Cognos Connection header to the right of the **Help** link. Only a url and a label in English are required. Target can be one of _blank, _self, _parent, or _top.
<CC_DIALOG_HEADER> <item show="user_type"> <url>*http-encoded URL to execute* </url> <onclick>*other action to take when link is clicked* </onclick> <target>*browser window to target* </target> <label xml:lang="en">*link text* </label> </item> </CC_DIALOG_HEADER>	Renders additional options to the right of the **Help** link in dialog boxes.

Appendix E: User Reference Help for Portal Services

Administrators typically configure default settings for each instance of a portlet before making it available to users.

When you access the Cognos portlets through your portal, you can change some settings to customize instances of each Cognos portlet. You can then save your settings for subsequent sessions.

You can change the content and layout of a portlet using the edit button on the title bar. If the page or portlet is read-only or locked by an administrator, the edit button is disabled or does not appear on the portlet title bar.

Cognos Navigator

Use this portlet to browse a list of links that open published Cognos reports and other entries.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the folder name is used by default. You can specify a title for each supported language version of the product. **Note:** The title does not appear in all portals, such as the WebSphere, Plumtree, and SAP portals.

Property	Description
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Folder	Specifies the location where the portlet navigation begins.
View	Specifies how entries are shown: • To show a list of entry names, use the **Navigator list** view. This is the default view. • To show entry names and detailed information, such as the last modification date, use the **Navigator details** view. Links open more detailed information about the entry. • To show URLs and shortcuts in an RSS-type format, use the **News list** view. RSS is a way of showing URLs in a Web page as short summaries that contain links to the associated pages.
Open links	Specifies how the links in this portlet are opened. You can • open and navigate the linked entries in a new browser window. This is the default option. • open and navigate the linked entries in the currently opened browser window. • open and navigate the linked entries in a specified HTML frame. Type the name of the window or frame in the provided text box. • open and navigate the linked entries in the Viewer portlet. Type the channel name as specified in Viewer.
Open navigation links inside this portlet	Specifies whether to maximize the portlet view when navigating the folder hierarchy.

Property	Description
Features to expose in the Navigator views	Specifies how the Cognos 8 entries are shown in this portlet: • To show or hide the parent entry of the starting folder in the Cognos 8 folder hierarchy, use the **Parent in path** check box. • To show or hide the **Actions** column for the entries, and view the content of container entries in source applications, use the **Actions** check box. • To show or hide the modification date and description of entries in applicable views, use the **Additional information** check box. • To specify in how many columns you want the entries to appear in the details view, use the **Number of columns in a details view** check box. The default is 2 for the normal portlet view, and 4 for the maximized portlet view. You can specify a different view for normal and maximized windows. **Note:** The maximized view is not available in SharePoint Portal Server.
Number of entries	Specifies the maximum number of entries to show per page. The menu bar in the portlet shows how many entries are available for a folder.
Separators	Specifies whether separators are used in a list view. To make long lists of entries easier to read, use alternating background colors to separate the entries in the list.

Cognos Search

Use this portlet to find published Cognos reports and other entries.

Searches are performed against various types of Cognos entries and folders. Use the advanced search options to perform more complex searches.

By default, the search results are shown as links that open entries in a new browser window.

You can save your search settings for future use.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the name Search is used by default. You can specify a title for each supported language version of the product. **Note:** The title does not appear in all portals, such as the WebSphere, Plumtree, and SAP portals.
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Saved searches	Specifies the saved results of previous searches. To save your most recent search results, type a name in the **Last search** box and then click **Save**. To rename a search, type the new name in the appropriate **Saved searches** text box. To delete a search, click **Delete** next to the appropriate **Saved searches** text box.
Open links	Specifies how the links are opened. You can • open and navigate the linked entries in a new browser window. This is the default option • open and navigate the linked entries in the currently opened browser window. • open the linked entries in a target browser window or frame. Type the name of the window or frame in the provided text box. • open and navigate the linked entries in the Cognos Viewer portlet. Type the channel name as specified in Cognos Viewer.

Property	Description
Number of results to show per page	Specifies the maximum number of entries to list per page.
Content of entry view	Specifies whether to show additional details for the entries in the search results. Use the **Show details** check box to show the entry modification date. Use the **Show actions** check box to show the entry actions. For example, you can use this option to view report outputs, run reports with options, open reports for editing, set properties, or set a schedule to run reports directly from the search results view.
Search results	Specifies how to show the search results. Select the **Maximize the view when displaying search results** check box when you want to show the results in a maximized view. This is useful when the results list is long.

Cognos Viewer (Cognos Connection)

Use this portlet to view and interact with published Cognos reports and other entries, and to enable interactivity between other Cognos Viewer portlets in the same page.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the entry name is used by default. You can specify a title for each supported language version of the product. **Note:** The title does not appear in all portals, such as the WebSphere, Plumtree, and SAP portals.
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Entry	Specifies the location of the entry, such as a report, to display in this portlet. You can search the folders to locate the entry. After you select the entry, the **Edit Properties** link appears. Use this link to access the advanced portlet properties.
Channel	Specifies the name of the portlet channel. The portlet channel represents a group of portlets, such as the Cognos Content portlets or Cognos Utility portlets. The channel name is used for portlet-to-portlet communication so that the portlets can interact with other portlets in the same group. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, Cognos, Cognos_Portlets, or CognosPortlets.
Portlet height in pixels	Specifies the portlet height in pixels. If the report image is larger than this setting, scroll bars appear when you view the report.

Advanced Properties

Use these properties to override the default Cognos Viewer properties, customize the portlet user interface, and enable interactivity between the Cognos Viewer portlets in the same page.

Property	Description
Fragment action	Defines the default action when the portlet is invoked in a page. When you select **Show a run action**, the run button appears in the portlet. When the button is clicked, the report runs. This feature helps to avoid running multiple reports a the same time. When **Show the most recent saved output** was selected and there is no saved report output when the portlet is invoked, you can choose to run the report, or show the run button.
Prompt the user	Controls prompted reports in a page or a dashboard. When you select **Every time**, if the report contains optional or required prompts, the user is prompted to enter the prompt values before the report is run. When you select **Only when required parameter values are missing**, the user is prompted if the report contains required prompts and the values are missing. Otherwise the report runs successfully. When you select **Never and show the report only when required values are provided**, Cognos Viewer attempts to run the report, but the page remains hidden until the required prompt values are provided. When you select **Based on the prompt settings of the report**, Cognos Viewer uses the prompts specified in the report.
Portlet communication options (Prompt values)	Enables communication between the Cognos Viewer portlets in the same page when using prompted reports. When you select the **Communicate with other portlets** check box, communication between the portlet and other portlets that also have this check box selected is enabled through the default channel. If you want to set up communication only between specific portlets, type the channel name. Only the portlets that share the channel name can interact. By specifying the channel name, you have more control over the page. For example, you can link only the reports that have matching parameters. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, sales_reports or AbC are valid channel names.

Property	Description
Drill down and drill up	Enables sharing of drill-down and drill-up actions when a page contains reports based on dimensionally modeled data sources. The item on which the drill action is based must be present in all linked reports in the page. In some cases, the sharing of drill events is not recommended. For example, simultaneous drill requests may have a negative impact on performance. When you select the **Communicate with other portlets** check box, communication between the portlet and other portlets that also have this check box selected is enabled through the default channel. If you want to set up communication only between specific portlets, type the channel name. Only the portlets that share the channel name can interact. By specifying the channel name, you have more control over the page. For example, you can link only the reports that have matching parameters. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, sales_reports or AbC.
Report-based drill through	Enables sharing of drill-through actions when a page contains a report with an authored drill-through path. You must select the **Communicate with other portlets on the page** check box, and type the channel name in the box provided. Only the portlets that share the channel name can interact. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, sales_reports or AbC are valid channel names.
View Options (Show Toolbar)	Specify whether the portlet toolbar should appear in the normal or maximized view. The toolbar contains the edit button, help button, and refresh button.

Cognos Viewer

Use this portlet to view and interact with published Cognos reports and other entries in your portal.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the entry name is used by default. You can specify a title for each supported language version of the product. **Note:** The title does not appear in all portals, such as the WebSphere, Plumtree, and SAP portals.
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Entry	Specifies the location of the entry, such as a report, to display in this portlet. You can search the folders to locate the entry.
Channel name	Specifies the name of the portlet channel. The portlet channel represents a group of portlets, such as the Cognos Content portlets or Cognos Utility portlets. The channel name is used for portlet-to-portlet communication so that the portlets can interact with other portlets in the same group. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, Cognos, Cognos_Portlets, or CognosPortlets.
Portlet action	Specifies the report run options. You can choose to show the most recent saved report output, show a run option button that a user can activate, or run the report.
Show toolbar	Specifies whether to show the portlet toolbar in the normal or maximized view. This applies to reports only. **Note:** The maximized view is not available in SharePoint Portal Server.

Property	Description
Portlet width in pixels	Specifies the portlet width in pixels. If the report image is larger than this setting, scroll bars appear when you view the report.
Portlet height in pixels	Specifies the portlet height in pixels. If the report is larger than this setting, scroll bars appear when you view the report.

Cognos Extended Applications

Use this portlet to view and interact with custom applications created using the Cognos 8 Software Development Kit.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Application	Specifies an application to show in the portlet.
Options	Some extended applications include application parameters that you can configure. These parameters affect how the application operates.

Metric List

Use this portlet to add performance metrics to a page. The metrics are created in Metric Studio.

You can configure the portlet to show different types of metric lists, such as a watch list, an accountability list, a scorecard or a strategy list.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Title Selection	Specifies the title of the portlet. You can use the default package or metric list name, or type a new name. If no title is specified, the Web page URL address is used by default. You can specify a title for each supported language version of the product. **Note:** The title does not appear in all portals, such as the WebSphere, Plumtree, and SAP portals.
Package Selection	Specifies a Metric Studio package that contains the metrics.

Property	Description
Metric List Selection	Use to add performance metrics to a page. You can configure the portlet to show the following types of metric lists: • **Watch List** Contains the metrics that a user wants to monitor closely. • **Accountability List** Contains the metrics that a user owns. • **Scorecard or Strategy List** Contains metrics associated to a strategy. The metrics can be grouped into scorecards. You can select a specific scorecard. If no scorecard is selected, all metrics in the strategy are shown.
Communicate with other portlets on the page	Enables communication between this portlet and the Cognos Viewer portlet. When you select the **Communicate with other portlets** check box, communication between this portlet and the Cognos Viewer portlet is enabled using the default channel. If you want to set up communication between only specific portlets, type the channel name. Only the portlets that share the channel name can interact. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, sales_reports or AbC are valid channel names.
Number of Entries	Specify the maximum number of metrics to display in the portlet.

Metric History Chart

Use this portlet to add a metric history chart to a page. The history chart is a graphical illustration of the historical performance of a metric. The metrics are created in Metric Studio.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

Notes

- In SAP Enterprise Portal, portlets are named iViews. This document may refer to iViews as portlets.
- In Microsoft SharePoint Portal Server, portlets are named Web Parts. This document may refer to Web Parts as portlets.

The following table shows the properties that you can change.

Property	Description
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Title Selection	Specifies the title of the portlet. If no title is specified, the Web page URL address is used by default. You can specify a title for each supported language version of the product. **Note:** The title does not appear in all portals, such as the WebSphere, Plumtree, and SAP portals.
Image Width	Specifies the image width in pixels. The range is 350 to 1000 pixels.
Image Height	Specifies the image height in pixels. The range is 100 to 1000 pixels.

Bookmarks Viewer

Use this portlet to register and show active Web links in a page.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the name Bookmarks Viewer is used by default. You can specify a title for each supported language version of the product.

Property	Description
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Bookmarks	Specifies the URL address of the Web page you want to register. You can type an alias next to the URL. The alias will be shown in the portlet instead of the URL. To add boxes for new URLs, click **Add a bookmark line**. To delete URLs, select the associated check box and click **Delete**.
Open links	Specifies how the links in this portlet are opened. You can • open and navigate the linked entries in a new browser window. This is the default option • open and navigate the linked entries in the currently opened browser window. • open the linked entries in a target browser window or frame. Type the name of the window or frame in the provided text box. • open and navigate the linked entries in the HTML Viewer portlet. Type the channel name as specified in HTML Viewer.

HTML Viewer

Use this portlet to insert any Web page into a page. The Web page is specified by a URL address.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the Web page URL address is used by default. You can specify a title for each supported language version of the product.

Property	Description
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
HTML content	Specifies the URL address of the Web page you want to insert in the portlet.
Channel name	Specifies the name of the portlet channel. The portlet channel represents a group of portlets, such as the Cognos Content portlets or Cognos Utility portlets. The channel name is used for portlet-to-portlet communication so that the portlets can interact with other portlets in the same group. The channel name can contain only letters, numbers, and underscore (_) characters, and must not contain any spaces. For example, Cognos, Cognos_Portlets, or CognosPortlets.
Portlet height in pixels	Specifies the portlet height in pixels. If the report image is larger than this setting, scroll bars appear when you view the report.

Image Viewer

Use this portlet to insert an image into a page. The image must be a single file that is accessible by a URL address. The image can also be used as a link.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the image URL address is used by default. You can specify a title for each supported language version of the product.

Property	Description
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Image	Specifies the location of the image. Type the associated URL address.
Target URL	Specifies the Web page where a link to the image or the image appears. Type the appropriate URL address.
Open links	Specifies how the links in this portlet are opened. You can • open and navigate the linked entries in a new browser window. This is the default option • open and navigate the linked entries in the currently opened browser window. • open the linked entries in a target browser window or frame. Type the name of the window or frame in the provided text box • open and navigate the linked entries in the HTML Viewer portlet. Type the channel name as specified in HTML Viewer.
Image size	Specifies the size of the image. You can leave the original size of the image, or customize the image by changing its height and width. You can also tile the image.

RSS Viewer

Use this portlet to show the content of a Real Simple Syndication (RSS) 1.0 or 2.0 news feed specified by a URL address. RSS is a format for syndicating news and is used by many Web sites to publish frequently updated content.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the Web page URL address is used by default. You can specify a title for each supported language version of the product.
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
URL	Specifies the URL address that identifies the RSS channel feed. The RSS channel includes a list of links to specific Web pages. The links may include a title and a short description of the linked story.
Features to expose	Specifies how the entries in this portlet are shown. Use the **Show details** option to include a description of an entry. Use the **Show the RSS channel signature** option to include an image, such as a logo, associated with the entry. Use the **Alternating backgrounds** option to separate entries in long lists with different background colors to make the entries easier to read.
Open links	Specifies how the links in RSS Viewer are opened. You can • open and navigate the linked entries in a new browser window. This is the default option. • open and navigate the linked entries in the currently opened browser window. • open the linked entries in a target browser window or frame. Type the name of the window or frame in the provided text box. • open and navigate the linked entries in the HTML Viewer portlet. Type the channel name as specified in HTML Viewer.
Maximum displayed entries	Specifies the maximum number of URLs to display in the portlet.

HTML Source

Use this portlet to insert custom text and images into a page.

This portlet adds a Freeform HTML code to the page, as typed by the user. For security reasons, the HTML tags that could pose a cross-site scripting threat, or break the integrity of the page, are not supported.

If invalid HTML code is added, the portlet may not render it successfully. In this situation, you may need to delete the portlet from the page and start again. For more information about supported tags, see the table in this section.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

The following table shows the properties used to configure this portlet.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the Web page URL address is used by default. You can specify a title for each supported language version of the product.
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
HTML Code	Specifies the HTML code to render in the view mode of the portlet. The code can be in any supported language. Type valid HTML code that contains: • supported HTML tags The following tags are not supported: • <BODY>, </BODY>, <FORM>, </FORM>, <HTML>, </HTML> These tags are filtered and removed from the code. • <HEAD>, </HEAD>, <FRAMESET>, </FRAMESET>, <FRAME></FRAME> These tags are filtered and removed from the code including the content between the start and end tags. • <script> JavaScript is not supported.

Property	Description
	• supported attributes for the tags • matching start and end tags Ensure that all start tags have matching end tags. When the start and end tags are not matched, the missing tag is removed, but the content remains. • absolute URLs in references to images and external resources, such as CSS files The URLs must include server names. Relative URLs are not supported. **Note:** You must have the required permissions for the **Styles and portlets** secured feature in Cognos 8 to access this property.

Multi-page

Use this portlet to create a dashboard with multiple tabs.

To modify the properties for this portlet, click the edit button to open the properties page. If the edit button is disabled or not visible, the administrator did not make these settings available to you.

In the portlet properties page, to reset the default portlet settings, or to return to the settings specified by your administrator, click the reset button in the portlet title bar. To exit the properties page without saving the changes, click the return button or click **Cancel**.

The following table shows the properties that you can change.

Property	Description
Title	Specifies the title of the portlet. If no title is specified, the Web page URL address is used by default. You can specify a title for each supported language version of the product.
Language	Specifies the product language version in which the title appears. You can assign the same title for multiple language versions.
Source folder for pages	Specifies a folder or package in Public Folders where the entries for the portlet tabs reside. The entries can be pages, reports, shortcuts, folders, and so on.

Property	Description
Display Style	Specifies how the tabs appear in the dashboard: horizontally at the top of the page, or vertically on the left side of the page.
Show icons in tabs	Shows the icons that represent the type of entry in each tab. For example, if the entry is a shortcut, the shortcut icon will be included in the tab.
Vertical tabs width	Specifies the default width in pixels for vertical tabs.
Show page menu	Specifies whether to show the tab menu button in the top, left side of the page. The tab menu is used to add, delete, and reorder the page tabs, and to edit the page.

Appendix F: Schema for Data Source Commands

When you work with data source connections, you can also add or edit data source commands.

Data source commands are run when the query engine performs specific actions on a database, such as opening a connection or closing a user session. For example, you can use data source commands to set up an Oracle proxy connection or virtual private database. For more information, see "Use Database Commands" (p. 167).

A data source command block is an XML document that is used to specify the commands that the database should run.

This document contains reference material about each element in the XML schema that defines the command blocks.

After the description of each element, separate sections describe

- the child elements that the element can or must have
- the parent elements that can contain the element

There are also code samples that show how you can use elements in a command block.

Element Model Group

The list of children for each element is presented as a DTD model group, and elements are listed in the order that they must occur. The following standard notation is used.

Symbol	Meaning
Plus sign (+)	The preceding element may be repeated more than once but must occur at least once.
Question mark (?)	The preceding element is optional. It may be absent or it may occur exactly once.
Asterisk (*)	An asterisk (*) after an element specifies that the element is optional. It may occur zero or more times.
None	If an element has no plus sign (+), question mark (?), or asterisk (*) following it, the element must occur only once.
Parentheses	Parentheses group elements. Element groups are controlled using the same symbols as elements.
Bar (|)	A bar (|) between elements specifies that one of the listed elements must be present.

Symbol	Meaning
Comma (,)	The elements that it separates must be present in the specified order.

commandBlock

Defines a group of commands that the database runs when specific events occur. This is the root element of the schema.

Child Elements of commandBlock Element

(commands)+

Parent Elements of commandBlock Element

The commandBlock element has no parent elements.

commands

Specifies the set of commands that the database runs. The commands run in the order that they appear within the commandBlock.

commands Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>PROXY_USER1</value>
        </argument>
      </arguments>
    </sessionStartCommand>
  </commands>
</commandBlock>
```

Child Elements of commands Element

(sessionStartCommand|sessionEndCommand|setCommand|sqlCommand)*

Parent Elements of commands Element

commandBlock

sessionStartCommand

Defines a command used to begin a proxy session in the database.

There should be only one sessionStartCommand per commandBlock. If the commandBlock contains more than one sessionStartCommand, only the last one will be used to create a proxy session.

sessionStartCommand Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>PROXY_USER1</value>
        </argument>
        <argument>
            <name>OCI_ATTR_PASSWORD</name>
            <value>password1</value>
        </argument>
      </arguments>
    </sessionStartCommand>
  </commands>
```

Child Elements of sessionStartCommand Element

(arguments)?

Parent Elements of sessionStartCommand Element

commands

sessionEndCommand

Defines a command used to terminate a proxy session in the database.

If no sessionEndCommand is supplied, the proxy session will be terminated upon disconnecting from the database.

sessionEndCommand Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionEndCommand>
      <arguments/>
    </sessionEndCommand>
  </commands>
</commandBlock>
```

Child Elements of sessionEndCommand Element

(arguments)?

Parent Elements of sessionEndCommand Element

commands

arguments

Specifies the argument values to be used with the command.

arguments Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionEndCommand>
      <arguments/>
    </sessionEndCommand>
  </commands>
</commandBlock>
```

Child Elements of arguments Element

(argument)*

Parent Elements of arguments Element

- sessionStart
- sessionEnd

argument

Defines an argument value for a call to a database API.

argument Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>PROXY_USER1</value>
        </argument>
        <argument>
            <name>OCI_ATTR_PASSWORD</name>
            <value>password1</value>
        </argument>
```

```
      </arguments>
    </sessionStartCommand>
  </commands>
</commandBlock>
```

Child Elements of argument Element

(name, value)

Parent Elements of argument Element

- arguments

setCommand

This element is reserved for future use.

sqlCommand

Defines a command that represents a native SQL statement to be run by the database.

sqlCommand Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sqlCommand>
      <sql> BEGIN PKG1.STORED_PROC1; END; </sql>
    </sqlCommand>
  </commands>
</commandBlock>
```

Child Elements of sqlCommand Element

(sql)

Parent Elements of sqlCommand Element

commands

sql

Specifies the SQL statement for the database to run. The SQL statement must be in native SQL.

sql Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
```

```
    <sqlCommand>
      <sql> BEGIN PKG1.STORED_PROC1; END; </sql>
    </sqlCommand>
  </commands>
</commandBlock>
```

Child Elements of sql Element

The sql element has no child elements.

Parent Elements of sql Element

sqlCommand

name

Identifies the argument to be set.

The value of the name element must be one of:

- OCI_ATTR_USERNAME
- OCI_ATTR_PASSWORD

name Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>PROXY_USER1</value>
        </argument>
      </arguments>
    </sessionStartCommand>
  </commands>
</commandBlock>
```

Child Elements of name Element

The name element has no child elements.

Parent Elements of name Element

- argument
- setCommand

value

Specifies the value to be used for the argument.

value Sample Code

Here is an example of how you can use this element in a commandBlock.

```
<commandBlock>
  <commands>
    <sessionStartCommand>
      <arguments>
        <argument>
          <name>OCI_ATTR_USERNAME</name>
          <value>PROXY_USER1</value>
        </argument>
      </arguments/>
    </sessionStartCommand>
  </commands>
</commandBlock>
```

Child Elements of value Element

The value element has no child elements.

Parent Elements of value Element

- argument
- setCommand

Appendix G: Data Schema for Log Messages

If you configure Cognos 8 to send log messages to a database (p. 71), the tables and the columns in each table are automatically created when you start the Cognos 8 services.

To avoid name conflicts with database keywords, all column names in the log database have the prefix "COGIPF". If you are upgrading from ReportNet 1.1 MR1 or MR2 to Cognos Series 8, the prefixes exist in the log database already and you do not need to make any changes. However, if you are upgrading from a release before ReportNet 1.1 MR1, to continue using reports that are based on the sample model from the previous release, you must update your audit metadata package to reflect the new column names. You can either:

- reimport the Sample Deployment Archive
- republish the package using the sample model

If you have created your own log database model, you must add the prefix "COGIPF" to the column names of the logging database tables in the model.

Document the procedure below in the location where we describe the existing columns for the audit DB.

Table Definitions

Log messages are recorded in a table in the logging database under certain conditions. These conditions depend on the logging level that you configure in the Web portal. For information about logging levels, see "Log Messages" (p. 72).

When a user logs on to Cognos 8, a session ID is assigned and recorded in all log messages. You can use the session ID to identify all actions performed by a user.

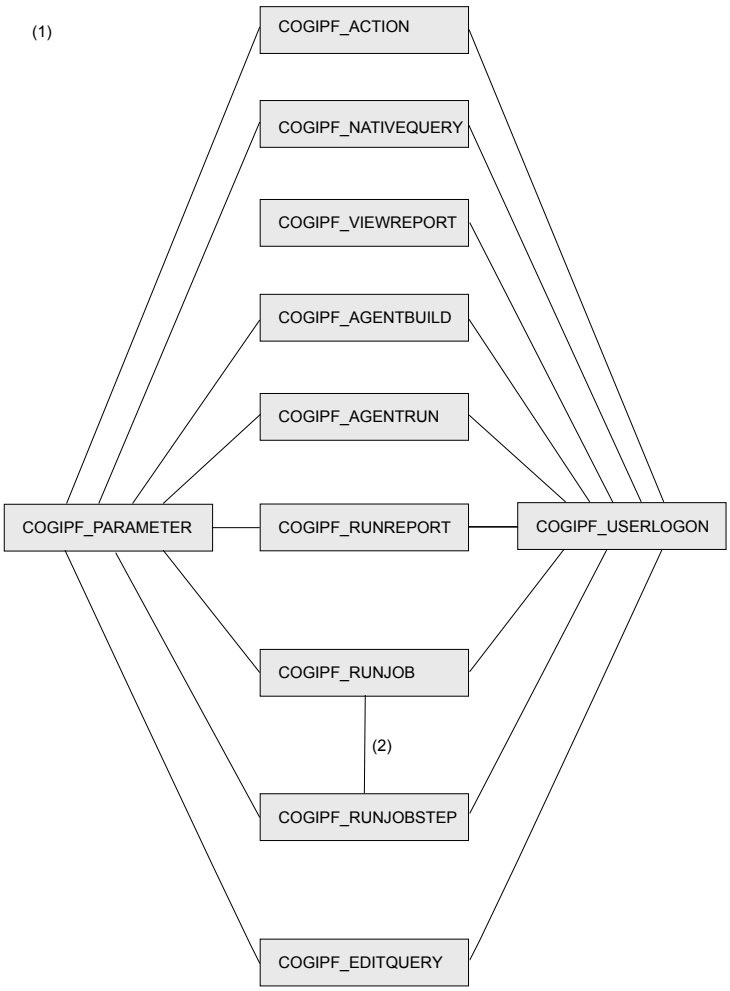
The database table definitions that are created in the logging database are described in the following table, with a cross-reference to associated column definitions.

Table Name	Description
COGIPF_ACTION (p. 686)	Stores information about operations performed on objects
COGIPF_USERLOGON (p. 687)	Stores user logon and logoff information
COGIPF_NATIVEQUERY (p. 688)	Stores information about queries that Cognos 8 makes to third-party components

Table Name	Description
COGIPF_PARAMETER (p. 689)	Stores parameter information logged by a component
COGIPF_RUNJOB (p. 690)	Stores information about job runs
COGIPF_RUNJOBSTEP (p. 692)	Stores information about job step runs
COGIPF_RUNREPORT (p. 694)	Stores information about report runs
COGIPF_VIEWREPORT (p. 698)	Stores information about report view requests
COGIPF_EDITQUERY (p. 696)	Stores information about query runs
COGIPF_AGENTBUILD (p. 701)	Stores information about agent mail delivery
COGIPF_AGENTRUN (p. 702)	Stores information about agent activity including tasks and delivery
COGIPF_THRESHOLD _VIOLATIONS (p. 702)	Stores information about threshold violations for system metrics

Table Interactions

An example of table interactions is shown in the following diagram. Your audit sample may be different depnding on your needs.



1. Interactions with
   COGIPF_PARAMETER are
   COGIPF_REQUESTID=
   COGIPF_REQUESTID
   Interactions with
   COGIPF_USERLOGON are
   COGIPF_SESSIONID=
   COGIPF_SESSIONID
2. COGIPF_REQUESTID=
   COGIPF_REQUESTID

COGIPF_ACTION Table

The COGIPF_ACTION table contains the following columns.

Column name	Data type	Description
COGIPF_HOST_ IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_ PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_LOCAL TIMESTAMP	DATE	The local date and time when the log message was generated
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_ REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_ LOG_LEVEL	NUMBER	The level of the indication

Column name	Data type	Description
COGIPF_ OPERATION	VARCHAR2 (255)	The action performed on the object
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_ TARGET_PATH	VARCHAR2 (512)	The target object path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank if execution has not completed, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details

COGIPF_USERLOGON Table

The COGIPF_USERLOGON table contains the following columns.

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_ HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request

Column name	Data type	Description
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_ LOGON_OPERATION	VARCHAR2 (255)	Logon, logoff, or logon expired
COGIPF_USERNAME	VARCHAR2 (255)	The display name of the user
COGIPF_USERID	VARCHAR2 (255)	The username of the user
COGIPF_ NAMESPACE	VARCHAR2 (255)	The namespace display name

COGIPF_NATIVEQUERY Table

The COGIPF_NATIVEQUERY table contains the following columns.

Column name	Data type	Description
COGIPF_HOST_ IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated

Column name	Data type	Description
COGIPF_HOST_ PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_ REQUESTSTRING	NTEXT	The query request string made to third-party components

COGIPF_PARAMETER Table

The COGIPF_PARAMETER table contains the following columns.

Column name	Data type	Description
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_OPERATION	VARCHAR2 (255)	The action performed on the object
COGIPF_TARGET_ TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_ PARAMETER_NAME	VARCHAR2 (255)	The name of the parameter logged by a component
COGIPF_ PARAMETER_VALUE	VARCHAR2 (512)	The value of the parameter logged by a component

COGIPF_RUNJOB Table

The COGIPF_RUNJOB table contains the following columns.

Column name	Data type	Description
COGIPF_HOST_ IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system

Column name	Data type	Description
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated While the report is executing, this is the time that the report execution started. After the report execution is complete, this is the end time of report execution. To check if execution is complete, see COGIPF_STATUS. A blank entry means an incomplete execution. A filled entry means execution completed. To calculate the execution start time for a report that has already completed execution, subtract COGIPF_RUNTIME from COGIPF_LOCALTIMESTAMP.
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run

Column name	Data type	Description
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_JOBPATH	VARCHAR2 (512)	The job path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_RUNTIME	NUMBER	The number of milliseconds it took the job to run

COGIPF_RUNJOBSTEP Table

The COGIPF_RUNJOBSTEP table contains the following columns.

Column name	Data type	Description
COGIPF_HOST_ IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system

Column name	Data type	Description
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated While the report is executing, this is the time that the report execution started. After the report execution is complete, this is the end time of report execution. To check if execution is complete, see COGIPF_STATUS. A blank entry means an incomplete execution. A filled entry means execution completed. To calculate the execution start time for a report that has already completed execution, subtract COGIPF_RUNTIME from COGIPF_LOCALTIMESTAMP.
COGIPF_ TIMEZONE_OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication

Column name	Data type	Description
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_ JOBSTEPPATH	VARCHAR2 (512)	The job step path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_RUNTIME	NUMBER	The number of milliseconds it took the jobstep run

COGIPF_RUNREPORT Table

The COGIPF_RUNREPORT table contains the following columns.

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system

Column name	Data type	Description
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated While the report is executing, this is the time that the report execution started. After the report execution is complete, this is the end time of report execution. To check if execution is complete, see COGIPF_STATUS. A blank entry means an incomplete execution. A filled entry means execution completed. To calculate the execution start time for a report that has already completed execution, subtract COGIPF_RUNTIME from COGIPF_LOCALTIMESTAMP.
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run

Column name	Data type	Description
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run Values: • Report ReportService for an interactive report • Report BatchService for a scheduled report
COGIPF_ REPORTPATH	VARCHAR2 (1024)	The report path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_RUNTIME	NUMBER	The number of milliseconds it took the report to run
COGIPF_ REPORTNAME	VARCHAR2 (512)	The name of the report that was run
COGIPF_PACKAGE	VARCHAR2 (1024)	The package that the report is associated with
COGIPF_MODEL	VARCHAR2 (512)	The model that the report is associated with

COGIPF_EDITQUERY Table

The COGIPF_EDITQUERY table contains the following columns.

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated While the report is executing, this is the time that the report execution started. After the report execution is complete, this is the end time of report execution. To check if execution is complete, see COGIPF_STATUS. A blank entry means an incomplete execution. A filled entry means execution completed. To calculate the execution start time for a report that has already completed execution, subtract COGIPF_RUNTIME from COGIPF_LOCALTIMESTAMP.
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)

Column name	Data type	Description
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_ BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_ QUERYPATH	VARCHAR2 (1024)	The report path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_RUNTIME	NUMBER	The number of milliseconds it took the query to run
COGIPF_ QUERYNAME	VARCHAR2 (512)	The name of the report that was queried
COGIPF_PACKAGE	VARCHAR2 (1024)	The package that the report is associated with
COGIPF_MODEL	VARCHAR2 (512)	The model that the report is associated with

COGIPF_VIEWREPORT Table

The COGIPF_VIEWREPORT table contains the following columns.

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated While the report is executing, this is the time that the report execution started. After the report execution is complete, this is the end time of report execution. To check if execution is complete, see COGIPF_STATUS. A blank entry means an incomplete execution. A filled entry means execution completed. To calculate the execution start time for a report that has already completed execution, subtract COGIPF_RUNTIME from COGIPF_LOCALTIMESTAMP.
COGIPF_TIMEZONE_ OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)

Column name	Data type	Description
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_BUILDNUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_ REPORTPATH	VARCHAR2 (1024)	The report path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_RUNTIME	NUMBER	The number of milliseconds it took the query to run
COGIPF_ REPORTNAME	VARCHAR2 (512)	The name of the report that was viewed
COGIPF_PACKAGE	VARCHAR2 (1024)	The package with which the report is associated
COGIPF_ REPORTFORMAT	VARCHAR2 (255)	The format of the report (p. 326)
COGIPF_MODEL	VARCHAR2 (512)	The model that the report is associated with

COGIPF_AGENTBUILD Table

The COGIPF_AGENTBUILD table contains the following columns.

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated
COGIPF_TIMEZONE_OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_BUILD NUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication

Column name	Data type	Description
COGIPF_OPERATION	VARCHAR2 (128)	The operation
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_TARGET_ NAME	VARCHAR2 (512)	The target name
COGIPF_ TARGET_PATH	VARCHAR2 (1024)	The target path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERRORDETAILS	VARCHAR2 (2000)	Error details
COGIPF_AGENT_ PATH	VARCHAR2 (1024)	The agent name
COGIPF_ SCHEDULETIME	INTEGER	The target schedule time
COGIPF_USER	VARCHAR2 (512)	The user who created the agent
COGIPF_EMAIL	VARCHAR2 (512)	The email address

COGIPF_AGENTRUN Table

The COGIPF_AGENTRUN table contains the following columns.

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated
COGIPF_TIMEZONE_OFFSET	NUMBER	The time zone, offset from GMT

Column name	Data type	Description
COGIPF_SESSIONID	VARCHAR2 (255)	The identification number of the session
COGIPF_REQUESTID	VARCHAR2 (255) UNIQUE NOT NULL	The identification number of the request
COGIPF_STEPID	VARCHAR2 (255)	The identification number for the step within a job run (empty if there is none)
COGIPF_ SUBREQUESTID	VARCHAR2 (255)	The identification number of the component subrequest
COGIPF_THREADID	VARCHAR2 (255)	The identification number of the thread where the request is run
COGIPF_ COMPONENTID	VARCHAR2 (4)	The name of the component that generates the indication
COGIPF_BUILD NUMBER	NUMBER	The major build number for the component that generates the indication
COGIPF_LOG_LEVEL	NUMBER	The level of the indication
COGIPF_OPERATION	VARCHAR2 (128)	The operation
COGIPF_ TARGET_TYPE	VARCHAR2 (255)	The object on which the operation is run
COGIPF_ TARGET_PATH	VARCHAR2 (1024)	The target path
COGIPF_STATUS	VARCHAR2 (255)	The status of the operation: blank, success, warning, or failure
COGIPF_ ERROR_DETAILS	VARCHAR2 (2000)	Error details
COGIPF_AGENTPATH	VARCHAR2 (1024)	The agent name
COGIPF_ SCHEDULETIME	INTEGER	The target schedule time
COGIPF_TARGET_ NAME	VARCHAR2 (512)	The target name

Column name	Data type	Description
COGIPF_USER	VARCHAR2 (512)	The user who created the agent
COGIPF_EMAIL	VARCHAR2 (512)	The email address

COGIPF_THRESHOLD_VIOLATIONS Table

The COGIPF_THRESHOLD_VIOLATIONS table contains the following columns. For more information, see "System Performance Metrics" (p. 83).

Column name	Data type	Description
COGIPF_ HOST_IPADDR	VARCHAR2 (15)	The host IP address where the log message is generated
COGIPF_HOST_PORT	NUMBER	The host port number
COGIPF_PROC_ID	NUMBER	The process ID assigned by the operating system
COGIPF_ LOCALTIMESTAMP	DATE	The local date and time when the log message was generated
COGIPF_TIMEZONE_OFFSET	NUMBER	The time zone, offset from GMT
COGIPF_COMPONENTID	VARCHAR2 (255)	The identification number of the component
COGIPF_BUILDNUMBER	NUMBER	The identification number of the build
COGIPF_LOG_LEVEL	NUMBER	The logging level. Should always be 1 to ensure that threshold violation information is available.
COGIPF_ OPERATION	VARCHAR2 (255)	A threshold for the metric has been crossed
COGIPF_TARGET_TYPE	VARCHAR2 (255)	The target type
COGIPF_ TARGETNAME	VARCHAR2 (4)	The target name

Column name	Data type	Description
COGIPF_ TARGET_PATH	VARCHAR2 (1024)	The target path of the dispatcher that conatins the threshold manager
COGIPF_RESOURCE_TYPE	VARCHAR2 (255)	The resource type that exceeds the threshold
COGIPF_ RESOURCE_PATH	VARCHAR2 (2000)	The path of the resource that exceeded the threshold value
COGIPF_METRIC_NAME	VARCHAR2 (1024)	The name of the metric
COGIPF_ METRIC_VALUE	VARCHAR2 (1024)	The value of the metric
COGIPF_METRIC_ HEALTH	VARCHAR2 (512)	The status of the metric: good, average, or poor
COGIPF_LOWER _AVG_THRSHLD	VARCHAR2 (512)	The lower average threshold setting. If COGIPF_LOWER_AVG _THRSHLD_XCL is 1, the metric score is average when the metric is less than this threshold setting. The metric score is good when the metric is greater than or equal than this value. If COGIPF_LOWER_ AVG_THRSHLD_XCL is 0 (zero), the metric score is average when the metric is less than or equal to this value. The metric score is good when the metric is greater than this value.

Column name	Data type	Description
COGIPF_LOWER_AVG _THRSHLD_XCL	BOOLEAN	The flag that indicates if the threshold setting in COGIPF_LOWER _AVG_THRSHLD is included when determining the metric score. If it is 0, the threshold setting is included when the metric score is determined. If it is 1, the threshold setting is not included when the metric score is determined.
COGIPF_LOWER_ POOR_THRSHLD	VARCHAR2 (512)	The lower poor threshold setting. If COGIPF_LOWER_ POOR_THRSHLD_XCL is 1, the metric score is poor when the metric is less than this threshold setting. If COGIPF_LOWER_ POOR_THRSHLD_XCL is 0 (zero), the metric score is poor when the metric is less than or equal to this value.
COGIPF_LOWER_POOR _THRSHLD_EXCL	BOOLEAN	The flag that indicates if the threshold setting in COGIPF_LOWER_ POOR_THRSHLD is included when determining the metric score. If it is 0, the threshold setting is included when the metric score is determined. If it is 1, the threshold setting is not included when the metric score is determined.

Column name	Data type	Description
COGIPF_UPPER_ AVG_THRSHLD	VARCHAR2 (512)	The upper average threshold setting If COGIPF_UPPER_ AVG_THRSHLD_XCL is 1, the metric score is poor when the metric is less than this threshold setting. If COGIPF_UPPER_ AVG_THRSHLD_XCL is 0 (zero), the metric score is average when the metric is greater than or equal to this value. The metric score is good when the metric is less than or equal to this value.
COGIPF_UPPER_AVG_ THRSHLD_EXCL	BOOLEAN	The flag that indicates if the threshold setting in COGIPF_UPPER_ AVG_THRSHLD is included when determining the metric score. If it is 0, the threshold setting is included when the metric score is determined. If it is 1, the threshold setting is not included when the metric score is determined.
COGIPF_UPPER _POOR_THRSHLD	VARCHAR2 (512)	The upper poor threshold setting. If COGIPF_UPPER_POOR _THRSHLD_XCL is 1, the metric score is poor when the metric is less than this threshold setting. If COGIPF_UPPER_ POOR_THRSHLD_XCL is 0 (zero), the metric score is poor when the metric is greater than or equal to this value.

Column name	Data type	Description
COGIPF_UPPER_POOR_THRSHLD_EXCL	BOOLEAN	The flag that indicates if the threshold setting in COGIPF_UPPER_POOR_THRSHLD is included when determining the metric score. If it is 0, the threshold setting is included when the metric score is determined. If it is 1, the threshold setting is not included when the metric score is determined.

Appendix H: Performing Tasks in Cognos 8 Using URLs

The URLs provide a quick and efficient way to start Cognos 8 components and open specified content, such as reports, metrics, folders, or pages.

You can use the URLs to

- start Cognos 8 components
- access a Cognos Connection page

You can use the URL Report sample program included with the Cognos 8 Software Development Kit (SDK) to perform basic tasks by clicking embedded links on an active server page. *For information about the samples installed with the SDK, see the Developer Guide*. However, for complex tasks, such as scheduling, we recommend that you use the SDK to create a custom application.

You use various declarations to identify the requested action, depending on the Cognos 8 component. Note that these declarations are not the same as the SDK methods exposed by the BI Bus API.

CGI Program and Alternative Gateways

All URL commands begin with a declaration of the end point for the request: either cognos.cgi or an alternative gateway. For Cognos 8, the complete syntax is:

`http://webservername:portnumber/cognos8/cgi-bin/cognos.cgi`

If you configured Cognos 8 to use a gateway other than the default CGI program, type the URL that corresponds to your gateway. For information about configuring gateways, see the *Installation and Configuration Guide*.

The supported gateways are

Gateway	URL
ISAPI	http://*webservername*/cognos8/isapi
Apache Connector (Windows)	http://*webservername*/cognos8/cgi-bin/mod_cognos.dll
Apache Connector (Solaris and AIX)	http://*webservername*/cognos8/cgi-bin/mod_cognos.so
Apache Connector (HPUX)	http://*webservername*/cognos8/cgi-bin/mod_cognos.sl
Gateway Servlet	http://*webservername:*9300/ServletGateway/servlet/Gateway

Gateway	URL
CGI	http://*webservername*/cognos8

Starting Cognos 8 Components

You can use a URL to start Cognos 8 components and open specified content. For example, you can quickly open a report in Query Studio, or a metric in Metric Studio without using Cognos Connection.

The components can be started from any enabled Web page.

You can use a URL to start the following Cognos 8 components:

- Report Studio (p. 713)
- Query Studio (p. 714)
- Analysis Studio (p. 715)
- Metric Studio (p. 716)
- Event Studio (p. 717)
- Cognos Viewer (p. 718)

There are two methods to start Cognos components: parameterized URLs and the cognosLaunch method. Both methods perform the same function and use the same parameters. You can use either method to perform any UI task.

Parameterized URL Method

The parameterized URL method can perform tasks or start specific components using parameters typed in the Web browser address bar. Using both get and post methods, the `launch.xts` or `cc.xts` parameter starts the specified Cognos 8 component.

This method requires that the parameters use the following format:
`&ArgumentName=ArgumentValue`

The `ArgumentName` parameter specifies the type, and the `ArgumentValue` parameter specifies the value of the called arguments. All names and values must be character strings.

This method is easier to begin using than the cognosLaunch method because it does not require advance preparation. However, the longer URL-encoded entries are restrained by browser character limits.

You can use these commands to browse content in Cognos Connection or view pages in Cognos Viewer.

cognosLaunch Method

The cognosLaunch method uses a JavaScript function to perform tasks and start components. To use the launch utility in a Web page, you must first include the following statement in the HTML file from which you start the specific component:

```
<script language="JavaScript" src="Cognos8Gateway/cognoslaunch.js">
</script>
```

`Cognos8Gateway` is the main Cognos 8 gateway defined in Cognos Configuration.

This statement enables the page to open a specified report in the chosen Cognos component using the `cognosLaunch` JavaScript parameters.

This method requires that the parameters use the following format:

```
"Argument Name","Argument Value"
```

The `Argument Name` parameter specifies the type, and the `Argument Value` parameter specifies the value of the called arguments. All names and values must be character strings.

The cognosLaunch method uses a simpler construction than the parameterized URL method, but requires an enabled starting page.

Start Parameters

Before using either the parameterized URL or cognosLaunch method you must first locate the object you want to access. The easiest way to identify the location of an object, such as a saved report, is to start Cognos Connection and copy the object search path (p. 724) into the required URL command. The full path must be copied, as listed in the report properties, including the relevant package name and report names.

For example, using the following parameterized URL starts Cognos Viewer and runs the report named Banded Report:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=cognosViewer&ui.
action=run&ui.object=/content/package[@name='GO Sales (analysis)']/folder
[@name='Report Studio Report Samples']/report[@name='2005 Sales Summary']
```

The following URL performs the same function using the cognosLaunch method in an enabled Web page:

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','CognosViewer','ui.action','run','ui.object','/
content/package[@name=\'GO Sales (analysis)\']/folder[@name=\'Report Studio
Report Samples\']/report[@name=\'2005 Sales Summary\']')
```

The following topics describe each of the parameters used in this example, and examples of some other commonly used parameters.

Mandatory Parameterized URL Parameters

If you are using the parameterized URL method to start any component, you must use the following parameters with this syntax:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts
```

followed by the specific component parameters you want to use.

If you want to start Cognos Connection using the parameterized URL method, use the following URL:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/cc.xts
```

The mandatory building blocks for parameterized URL commands are as follows:

- `gateway`

  This is the mandatory argument value that specifies the Cognos 8 gateway. The gateway name in this example is `http://server/cognos8/cgi-bin/cognos.cgi?`.

- `b_action=xts.run`

  Identifies the action.

- `m=portal/component_name.xts`

  Identifies the component interface that displays the result.

- `m_object=defaultOutput(<report_search_path>)`

  Specifies the content store location of the saved report.

Mandatory cognosLaunch Parameters

If you are using the cognosLaunch method to start any component, use the following parameters with this syntax:

```
cognosLaunch("ui.gateway"," gateway ","ui.tool","
component")
```

- `"ui.gateway"`

  This is the mandatory argument value that specifies the Cognos 8 gateway.

- `"ui.tool"`

  This is the mandatory argument value that specifies the Cognos 8 component.

Common Optional Parameters

In addition to the mandatory parameters required by each Cognos 8 component, you can use the following optional parameters, unless otherwise specified:

- `ui.backURL`

  Specifies the URI to open after you close the selected component.

- `ui.folder`

  Specifies the target folder. Acceptable values are the Content Manager search path or store ID. For more information, see "Using Search Paths and Page IDs" (p. 723).

- `ui.action`

  Specifies the action to take. Acceptable values for the components are `new` and `edit`. The default is `new`. Acceptable values for Cognos Viewer are `run` and `view`. The default is `view`.

  This parameter is mandatory for Event Studio. You cannot use this parameter with Metric Studio.

- `ui.drillThroughTargetParameterValues`

  Use this parameter when the report that you want to drill through contains a prompt. This parameter specifies the values that fulfill that prompt, and display the requested data. The acceptable value is a Web64-encoded XML string. This string must include the name of the prompt parameter you want to fulfill, and its values. Using the example in "Start Parameters" (p. 711), if you wanted to start Cognos Viewer to run the Target report and get information specific to Italy, you would append the URL with the `ui.drillThroughTargetParameterValues` argument name, followed by this argument value:

  ```
  <parameterValues
  SOAP-ENC:arrayType=\"bus:parameterValue[]\" xsi:type=\"SOAP-ENC:Array\"><item
  xsi:type=\"bus:parameterValue\"><name xsi:type=\"xs:string\">Country</
  name><value SOAP-ENC:arrayType=\"bus:parmValueItem[]\" xsi:type=\"SOAP-ENC:
  Array\"><item xsi:type=\"bus:simpleParmValueItem\"><use xsi:type=\"xs:string\
  ">Italy</use></item></value></item></parameterValues>
  ```

  You cannot use this parameter with Event Studio or Metric Studio.

Starting Report Studio

You can use a URL to open and run a specific report in Report Studio.

Use the following parameters to start Report Studio with the parameterized URL method:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.gateway=http://localhost/cognos8
/cgi-bin/cognos.cgi&ui.tool=ReportStudio&ui.object=/content&ui.action=new
```

Use the following parameters to start Report Studio with the cognosLaunch method:

```
cognosLaunch("ui.gateway","gateway","ui.tool","ReportStudio")
```

Parameterized URL Examples

This section provides example parameters for performing specific functions when starting Report Studio.

- Starting Report Studio to a specific package

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
  xts&ui.gateway=http://localhost/cognos8
  /cgi-bin/cognos.cgi&ui.tool=ReportStudio&ui.object=/content/package[@name='GO
   Sales (analysis)']
  ```

- Editing a report in Report Studio

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
  xts&ui.gateway=http://localhost/cognos8
  /cgi-bin/cognos.cgi&ui.tool=ReportStudio&ui.object=/content/package[@name='GO
   Sales (analysis)']/folder[@name='Report Studio Report Samples']/report
  [@name='2005 Quarterly Sales Forecast']&ui.action=edit
  ```

cognosLaunch Examples

This section provides example parameters for performing specific functions when starting Report Studio.

- Starting Report Studio

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','ReportStudio','ui.action','new','ui.object','/
content/package[@name=\'GO Sales (analysis)\']')
```

- Starting Report Studio to a specific package

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','ReportStudio','ui.action','edit','ui.
object','/content/package[@name=\'GO Sales (analysis)\']/folder[@name=\'Report
 Studio Report Samples\']/report[@name=\'2005 Quarterly Sales Forecast\']')
```

- Editing a report in Report Studio

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','ReportStudio','ui.action','edit','ui.
object','/content/package[@name=\'GO Sales (analysis)\']/folder[@name=\'Report
 Studio Report Samples\']/report[@name=\'2005 Quarterly Sales Forecast\']')
```

Starting Query Studio

You can use a URL to quickly open a specific report in Query Studio.

Use the following mandatory parameters to start Query Studio with the parameterized URL method:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.tool=QueryStudio&ui.object=/content&ui.action=new
```

Use the following mandatory parameters to start Query Studio with the cognosLaunch method:

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','QueryStudio','ui.action','new')
```

The following parameters are optional:

- `ui.object`

  Specifies the path of the target object. Acceptable values are the Content Manager search path or store ID. For more information, see "Using Search Paths and Page IDs" (p. 723).

- `cv.header`

  Specifies whether to display the header. Acceptable values are `true` and `false`.

- `ui.spec`

  Specifies an XML document that contains a Cognos 8 report specification. For information about Cognos 8 report specifications, see the report specification topics in the Cognos 8 SDK *Developer Guide*.

- `run.outputLocale`

  Specifies the output language. Acceptable values are expressed as a hyphenated language-region pair, in accordance with the RFC3066 standard. The default value is `en-us`.

- `run.prompt`

  Specifies whether the report service issues prompts, so you can enter report option values. Acceptable values are `true` and `false`. The default value is `true`.

Use the following parameters for debugging purposes only:

- `run.outputFormat`

Specifies the output format. Acceptable values are `CSV`, `HTML`, `PDF`, `singleXLS`, `XHTML`, `XLWA`, and `XML`.

- `asynch.primaryWaitThreshold`

  Specifies the maximum amount of time, in seconds, that the server can use to process the request before sending a response to the client. Acceptable values are any integer. Use a value of `0` to make the client wait indefinitely. The default value is `7`.

- `asynch.secondaryWaitThreshold`

  Specifies the maximum amount of time, in seconds, that the server can use to process the request before sending a response to the client. Acceptable values are any integer. Use a value of `0` to make the client wait indefinitely. The default value is `30`.

Parameterized URL Examples

This section provides example parameters for performing specific functions when starting Query Studio.

- Starting Query Studio to a specific package

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.tool=QueryStudio&ui.object=/content/package[@name='GO Sales (query)
']&ui.action=new
```

- Starting Query Studio to a specific report

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.tool=QueryStudio&ui.object=/content/package[@name='GO Data Warehouse
 (analysis)']/folder[@name='Query Studio Report Samples']/query[@name='Returns
 by Product Type']&ui.action=edit
```

cognosLaunch Examples

This section provides example parameters for performing specific functions when starting Query Studio.

- Starting Query Studio to a specific package

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','QueryStudio','ui.action','new','ui.object','/
content/package[@name=\'GO Data Warehouse (analysis)\']')
```

- Starting Query Studio to a specific report

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','QueryStudio','ui.action','edit','ui.object','/
content/package[@name=\'GO Data Warehouse (analysis)\']/folder[@name=\'Query
 Studio Report Samples\']/query[@name=\'Return Quantity by Product Line\']
')
```

Starting Analysis Studio

You can use a URL to quickly open and run a specific report in Analysis Studio.

Use the following parameters to start Analysis Studio with the parameterized URL method:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.gateway=http://localhost/cognos8
/cgi-bin/cognos.cgi&ui.tool=AnalysisStudio&ui.action=new
```

Use the following parameters to start Analysis Studio with the cognosLaunch method:

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','AnalysisStudio','ui.action','new')
```

- `ui.object`

  This is the mandatory argument that specifies the path of the target object. Acceptable values are the Content Manager search path or store ID. For more information, see "Using Search Paths and Page IDs" (p. 723).

Parameterized URL Examples

This section provides example parameters for performing specific functions when starting Analysis Studio.

- Starting Analysis Studio to a specific package

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
  xts&ui.gateway=http://localhost/cognos8
  /cgi-bin/cognos.cgi&ui.tool=AnalysisStudio&ui.tool=AnalysisStudio&ui.object=/
  content/package[@name='Go Data Warehouse (analysis)']&ui.action=new
  ```

- Viewing an analysis report in Analysis Studio

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
  xts&ui.gateway=http://localhost/cognos8
  /cgi-bin/cognos.cgi&ui.tool=AnalysisStudio&ui.tool=AnalysisStudio&ui.object=/
  content/package[@name='Sales and Marketing (cube)']/folder[@name='Analysis
  Studio Report Samples']/analysis[@name='Combine Filters Sample']&ui.
  action=edit
  ```

cognosLaunch Examples

This section provides example parameters for performing specific functions when starting Analysis Studio.

- Starting Analysis Studio to a specific package

  ```
  cognosLaunch('ui.gateway','http://localhost/cognos8
  /cgi-bin/cognos.cgi','ui.tool','AnalysisStudio','ui.action','new','ui.
  object','/content/package[@name=\'Sales and Marketing (cube)\']')
  ```

- Viewing an analysis report in Analysis Studio

  ```
  cognosLaunch('ui.gateway','http://localhost/cognos8
  /cgi-bin/cognos.cgi','ui.tool','AnalysisStudio','ui.action','edit','ui.
  object','/content/package[@name=\'Sales and Marketing (cube)\']/folder[@name=\
  'Analysis Studio Report Samples\']/analysis[@name=\'Combine Filters Sample\
  ']')
  ```

Starting Metric Studio

You can use a URL to quickly open a metric in Metric Studio.

Use the following parameters to start Metric Studio with the parameterized URL method:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.tool=MetricStudio&ui.action=new
```

Use the following parameters to start Metric Studio with the cognosLaunch method:

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','MetricStudio')
```

- `ui.object`

  This is the mandatory argument that specifies the path of the target object. Acceptable values are the Content Manager search path or store ID. For more information, see "Using Search Paths and Page IDs" (p. 723).

Parameterized URL Examples

This section provides example parameters for performing specific functions when starting Metric Studio.

- Starting Metric Studio to a specific package

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.xts&ui.tool=MetricStudio&ui.object=/content/package[@name='GO Metrics']&ui.action=new
```

cognosLaunch Examples

This section provides example parameters for performing specific functions when starting Metric Studio.

- Starting Metric Studio

```
cognosLaunch('ui.gateway','http://localhost/cognos8/cgi-bin/cognos.cgi','ui.tool','MetricStudio','ui.object','/content')
```

- Starting Metric Studio to a specific package

```
cognosLaunch('ui.gateway','http://localhost/cognos8/cgi-bin/cognos.cgi','ui.tool','MetricStudio','ui.object','/content/package[@name=\'GO Metrics\']')
```

Starting Event Studio

You can use a URL to quickly access and edit an agent in Event Studio.

Use the following parameters to start Event Studio with the parameterized URL method:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.xts&ui.tool=EventStudio&ui.object=/content/package[@name='GO Sales (analysis)']&ui.action=run
```

Use the following parameters to start Event Studio with the cognosLaunch method:

```
cognosLaunch('ui.gateway','http://localhost/cognos8/cgi-bin/cognos.cgi','ui.tool','EventStudio')
```

The following parameters are mandatory:

- `ui.action`

  This parameter specifies the action to take. Acceptable values are `new`, `run`, or `edit`. The default is `new`.

- `ui.object`

  This parameter specifies the path of the target object. Acceptable values are the Content Manager search path or store ID. For more information, see "Using Search Paths and Page IDs" (p. 723).

Parameterized URL Examples

This section provides examples of parameters for performing specific functions when starting Event Studio.

- Opening an agent in Event Studio

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=xts.run&m=portal/launch.
xts&ui.tool=EventStudio&ui.object=/content/package[@name='GO Events']/
agentDefinition[@name='GO Event']&ui.action=run
```

cognosLaunch Examples

This section provides examples of parameters for performing specific functions when starting Event Studio.

- Starting Event Studio

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','EventStudio','ui.action','new','ui.object','/
content/package[@name=\'GO Sales and Retailers\']')
```

- Opening an agent in Event Studio

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','EventStudio','ui.action','edit','ui.object','/
content/package[@name=\'GO Events\']/agentDefinition[@name=\'GO Event\']')
```

Starting Cognos Viewer

You can use a URL to quickly open a specified report in Cognos Viewer.

Use the following parameters to start Cognos Viewer with the parameterized URL method:

```
http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=cognosViewer&ui.
action=view&ui.object=/content/package[@name=/content/package[@name='Sales and
 Marketing (cube)']/folder[@name='Report Studio Report Samples']/report
[@name='Revenue by Product Brand'])
```

Use the following parameters to start Cognos Viewer with the cognosLaunch method:

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','CognosViewer')
```

For a complete list of the Cognos Viewer parameters, see "URL API Reference" Appendix in the SDK Developer Guide.

The following parameters are optional:

- `run.outputFormat`

  Specifies the output format. Acceptable values are `CSV`, `HTML`, `PDF`, `singleXLS`, `XHTML`, `XLWA`, and `XML`.

  Note: To protect Cognos 8 and your servers, the Cognos Application Firewall (CAF) rejects URL-based requests for output in XLS format.

- `run.outputLocale`

  Specifies the output language. Acceptable values are expressed as a hyphenated language-region pair, in accordance with the RFC3066 standard. The default value is `en-us`.

- `run.prompt`

Specifies whether the report service issues prompts, so you can enter report option values. Acceptable values are `true` and `false`. The default value is `true`.

- `run.xslURL`

  Specifies the location of an XSL stylesheet that can be applied to the report, thereby rendering it in the requested format. An acceptable value is a URI.

  When referencing the XSL file, ensure that the specified file is valid, and exists on the application server in the templates/rsvp/xsl directory. Referencing an invalid stylesheet terminates the process.

- `run.outputEncapsulation`

  Specifies how output documents in the response are encapsulated. Acceptable values are `HTML`, `URL`, `URLQueryString`, `none`.

- `asynch.attachmentEncoding`

  Specifies how attachments to the response are encoded. Acceptable values are `base64`, `MIME`, `MIMECompressed`. The default value is `base64`.

- `asynch.primaryWaitThreshold`

  Specifies the maximum amount of time, in seconds, that the server can use to process the request before sending a response to the client. Acceptable values are any integer. Use a value of `0` to make the client wait indefinitely.The default value is `7`.

- `asynch.secondaryWaitThreshold`

  Specifies the maximum amount of time, in seconds, that the server can use to process the request before sending a response to the client. Acceptable values are any integer. Use a value of `0` to make the client wait indefinitely.The default value is `30`.

Parameterized URL Examples

This section provides example parameters for performing specific functions when viewing reports.

- Viewing saved reports

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=cognosViewer&ui.
  action=view&ui.object=defaultOutput(/content/package[@name='GO Sales
  (analysis)']/folder[@name='Report Studio Report Samples']/report[@name='2005
   Sales Summary\'])
  ```

- Running live reports

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=cognosViewer&ui.
  action=run&ui.object=/content/package[@name='GO Sales (analysis)']/folder
  [@name='Report Studio Report Samples']/report[@name='2005 Sales Summary']
  ```

- Viewing reports in different output modes

  ```
  http://localhost/cognos8/cgi-bin/cognos.cgi?b_action=cognosViewer&ui.object=/
  content/package[@name='GO Sales (analysis)']/folder[@name='Report Studio
  Report Samples']/report[@name='2005 Sales Summary']&ui.action=run&run.
  outputFormat=PDF
  ```

cognosLaunch Examples

This section provides example parameters for performing specific functions when viewing reports.

- Viewing saved reports

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','CognosViewer','ui.action','view','ui.
object','defaultOutput(/content/package[@name='GO Sales (analysis)']/folder
[@name='Report Studio Report Samples']/report[@name='2005 Sales Summary'])
')
```

- Running live reports

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','CognosViewer','ui.action','run','ui.object','/
content/package[@name='GO Sales (analysis)']/folder[@name='Report Studio
Report Samples']/report[@name='2005 Sales Summary']')
```

- Viewing reports in different output modes

```
cognosLaunch('ui.gateway','http://localhost/cognos8
/cgi-bin/cognos.cgi','ui.tool','CognosViewer','ui.action','run','ui.object','/
content/package[@name='GO Sales and Retailers']/folder[@name= 'Report Studio
 Report Samples']/report[@name='2005 Sales Summary']','run.outputFormat',
'PDF')
```

Starting Cognos 8 Components in a Specified Browser Window

This feature allows you to start a Cognos 8 component in a named browser window.

To do this, you must use the following parameters with this syntax:

`cognosLaunchInWindow(windowName, windowProperties, "ui.gateway","` *`gateway`*`","ui.tool","`*`component`*`")`

The `windowName` and `windowProperties` parameters represent the values specific to starting a Cognos 8 component in a named browser window.

The `windowName` string is the name of the browser window, frame, or iframe in which to start the specified component. If the specified name does not exist, a newly created pop-up browser window appears with the name. To create a new pop-up window, use `"_blank"` as the value.

The `windowProperties` string defines the properties applied to the new pop-up window. This only applies to newly created windows. The available values depend on the type of the Web browser you are using, and correspond to the values supported by the JavaScript `window.open()` function. Some options may not work in all browsers.

The `windowProperties` parameter consists of a comma-separated list. Each item consists of an option and a value, separated by the equals sign (=). For example, `"fullscreen=yes , toolbar=yes"`. Some common examples include:

- `channelmode`

  Specifies whether to display the window in theater mode, and show the channel band. The default is `no`. Acceptable values are `yes` and `no`.

- `directories`

  Specifies whether to add directory buttons. The default is `yes`. Acceptable values are `yes` and `no`.

- `fullscreen`

  Specifies whether to display the browser in full-screen mode. This mode hides the browser's title bar and menus. A window in full-screen mode must also be in channelmode. The default is `no`. Acceptable values are `yes` and `no`.

- `height`

  This integer specifies the height of the window, in pixels. The minimum value is `100`.

- `left`

  This integer specifies the left position, in pixels, relative to the upper-left corner of the screen.

- `location`

  Specifies whether to display the input field for entering URLs directly into the browser. The default is `yes`. Acceptable values are `yes` and `no`.

- `menubar`

  Specifies whether to display the menu bar. The default is `yes`. Acceptable values are `yes` and `no`.

- `resizable`

  Specifies whether to display resize handles at the corners of the window. The default is `yes`. Acceptable values are `yes` and `no`.

- `scrollbars`

  Specifies whether to display horizontal and vertical scroll bars. The default is `yes`. Acceptable values are `yes` and `no`.

- `status`

  Specifies whether to display a status bar at the bottom of the window. The default is `yes`. Acceptable values are `yes` and `no`.

- `titlebar`

  Specifies whether to display a title bar for the window. This parameter is only valid if the calling application is an HTML Application, or a trusted dialog box. The default is `yes`. Acceptable values are `yes` and `no`.

- `toolbar`

  Specifies whether to display the browser toolbar. The default is `yes`. Acceptable values are `yes` and `no`.

- `top`

  This integer specifies the top position, in pixels. This value is relative to the upper-left corner of the screen.

- `width`

  This sets the width of the window, in pixels. The minimum value is `100`.

The `ui.gateway`, `ui.tool`, along with some additional parameter values are described in "Start Parameters" (p. 711).

Access a Cognos Connection Page

Using a URL, you can quickly access any Cognos Connection page. For example, if you use a corporate portal not supported by Portal Services, and use Cognos portlets to populate frames in that portal, you can embed any Cognos Connection page using the page URL. This page appears in a targeted frame, using your corporate look and feel.

Before you can access a Cognos Connection page using URLs, you must prepare the page for standalone access (p. 723).

Step

- In a browser, type a URL using the following parameters:
  `http://[gateway]?b_action=xts.run&m=portal/cc.xts&m_page=path:[search path]&style=[stylesheet]&ui=h1&m_pagemode=view]`

  The parameters for starting a page are as follows:

  - `gateway`

    Full prefix that identifies the Cognos 8 gateway. For example,`localhost/cognos8/cgi-bin/cognos.cgi`.

  - `m=portal/cc.xts`

    Identifies the component interface.

  - `m_page=path:[search path]`

    Identifies a Cognos Connection page. For more information, see "Using Search Paths and Page IDs" (p. 723).

  - `style=[stylesheet]`

    Identifies the .css file that overrides the default Cognos 8 style.

    The Cognos Connection pages use the Cognos 8 stylesheet by default. You may want to use your own corporate style to maintain a consistent look and feel of your page. To do so, in the URL, set the `style=[stylesheet]` parameter to the location of the required .css file. For example, `style=http://myserver/mystyles.css`.

  - `ui=h1`

    Hides some of the Cognos 8 user interface elements.

    When a Cognos Connection page appears as a portion of another Web page, some of its user interface elements, such as top headers, links, and toolbars, may became redundant. You can hide these elements and leave only the required content of the page. In this example, `h1` hides the main Cognos Connection header. For more information about hiding user interface elements, see the chapters about customization in the *Administration and Security Guide*.

- `m_pagemode=view`

  Hides some of the portlet user interface elements, and makes the page read-only.

  Some of the portlet user interface elements, such as frames around the portlets and title bars, may become redundant when the portlet appears within another page. You can hide these elements.

Preparing a Page for Standalone Access

You must prepare each page in Cognos Connection so that the page can be accessed by using a URL. You must do this even if you intend to use only one portlet in the page.

Ensure that the following conditions are met.

- The page is saved in a public folder in Cognos Connection.

  The objects in Public Folders can be accessed by all users. Individual users can access a standalone page from their own My Folders directory, but these objects will only be accessible to that single user.

- The Cognos 8 logon mechanism is implemented by your application.

  Your application is responsible for authenticating users. This is not required if the host application and Cognos 8 have already established single signon.

  For more information about setting single signon, see the *Installation and Configuration Guide*.

- The required access permissions are set for the page.

  Read permissions are granted to all users of a third party page or application that embeds the Cognos Connection page. Write permissions are granted to the portal administrator and the page owner. This makes the page read-only, preventing other users from editing the portlet settings inside the page.

  For more information about setting access permissions, see the *Administration and Security Guide*.

The page is now ready for standalone access (p. 722).

Using Search Paths and Page IDs

When building URLs, you need to know the search paths of the objects you want to access using the URLs.

If you want to access a Cognos Connection page, you can use its search paths or its ID. Search paths define the fully qualified location of the entry in the content store and are not installation-specific. IDs are installation-specific. For ease of use, we recommend that you access the page using search paths (p. 724).

When using the cognosLaunch method, you specify the object's search path after the "ui.object" parameter.

If you are using the parameterized URL method, specify the object's search path using the following `m_page` parameter format, where `search path` is the search path of the page object:

```
&m_page=path:[[search
path]]
```

For example,

```
m_page=path:/content/folder[@name='Public
Pages']/pagelet[@name='EP
portlet Demo'
```

Tip: To find the page search path and ID in Cognos Connection, navigate to the folder that contains the page and click the page properties button. On the **General** tab, click **View the search path, ID and URL**.

Using a Page ID Instead of the Object Search Path

Instead of the search path, you can also specify the object's page ID using the following cognosLaunch parameters:

```
"ui.object","storeID('storeID')
```

If you are using the parameterized URL method (p. 710), you can specify the object's page ID using the following `m_page` parameter format, where `page ID` is the object's page ID:

```
m_page=[page ID]
```

The ID appears as an unseparated series of characters. For example,

```
i80E9B692820A4F91B8655D4E84F292AF
```

To find the IDs, follow the instructions in "Using Search Paths and Page IDs" (p. 723).

Deployment Considerations

References to deployment objects are based on search paths, not IDs. For a specific Cognos Connection page, the object's page ID remains valid until the application's deployment mechanism transfers the original object to another Cognos 8 server. In the destination environment, all IDs are different. In such an event, you must map all ID references to the new IDs on the system.

Glossary

access permissions

Rules defining the access rights to resources. Access permissions can be granted to any combination of namespaces, groups, or users. Examples of resources are reports and folders.

agent

The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform. Once defined, an agent can be scheduled to check for instances of the event.

analysis

A process where a user interacts with data to gain insight and understanding. In Cognos 8, Analysis Studio is designed to facilitate analysis.

anonymous access

A method of accessing resources in which users are not authenticated, and all users gain the same access permissions.

authentication

The process of verifying the identity of users when they log on. Users must be authenticated before they can be authorized to use any secured resources.

authentication provider

The communication mechanism to an external authentication source. Functionality such as user authentication, group membership, and namespace searches are made available through authentication providers.

burst

To create many report results by running a single report once. For example, you can create a report that shows sales for each employee, and run it once, sending different results to regional managers by bursting on region. You set up bursting in Report Studio and enable it in the portal.

burst key

The dimension or level of a query in the report specification that is used to create, or burst, a set of report results. For example, you can create a report that shows sales for each employee, and send different results to regional managers by bursting on region.

capabilities

Capabilities refer to the ability to use certain functions and features within Cognos 8. The Capabilities tool controls access to secured functions such as Administration and the Cognos Query Studio, and secured features, such as User Defined SQL and Bursting. The permissions define which of the predefined and built-in Cognos groups and roles have access to which secured functions and features, and the type of access. Access to these capabilities is set by the security administrator. Users can see their access permissions in the Personal area of their Preferences, under Capabilities.

connection

The named information that defines the type of the data source, its physical location, and any signon requirements. A data source can have more than one connection.

contact

A named email address to which reports and agent emails can be sent. Contacts are never authenticated.

content locale

A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, money expressions, and time of day.

For Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).

Content Manager

The Cognos 8 service that manages the storage of customer applications, including application-specific security, configuration data, models, metrics, reports, and report output. Content Manager is needed to publish models, retrieve or store report specifications, manage scheduling information, and manage the Cognos namespace.

content store

The database that contains data that Cognos 8 needs to operate, such as report specifications, published models, and the packages that contain them; connection information for data sources; information about the external namespace, and the Cognos namespace itself; and information about scheduling and bursting reports.

Design models and log files are not stored in the content store.

The Cognos 8 service that uses the content store is named Content Manager.

credentials

Information stored about the identity of a Cognos user, usually a user name and password. You can assign your credentials to someone else so that they can use resources that you are authorized to use.

Credentials are created for Cognos components. If a user schedules or programs an action, credentials must be stored in the content store.

data source

A relational database, dimensional cube, file, or other physical data store that can be accessed though Cognos 8.

deployment

The process of moving a Cognos 8 application (reports, models, and so on) to a different instance of Cognos 8. For example, you often create reports in a test environment and then deploy them to production.

When you deploy an application, you export, transfer, and import it.

deployment archive

A file used for deployment. A deployment archive contains the data from the content store that is being moved.

deployment specification

A definition of what packages to move (deploy) between source and target environments, the deployment preferences, and the archive name. You use deployment specifications for import and for export.

drill down

In Cognos Planning, drill down is a technique used to analyze D-Cube data that was imported by a D-Link. You can drill down on any single cell in a D-Cube. If the cell contains data transferred by a D-Link, drill down opens a view of the source data. If the data was imported from another D-Cube, drill down opens the appropriate selection from the source D-Cube. If the data was imported from an external source (a mapped ASCII file or an ODBC database), drill down extracts the relevant data from the source file and displays it in a special drill-down results dialog box.

In Cognos 8 BI, drill down refers to the act of navigating from one level of data to a more detailed level. The levels are set by the structure of the data. See also drill up.

drill up

The act of navigating from one level of data to a less detailed level. The levels are set by the structure of the data.

See also drill down.

event

An exceptional item of data, defined by specifying a query expression against items in a package. When data is detected matching the event condition, it causes an agent to perform tasks.

gateway

An extension of a Web server program that transfers information from the Web server to another server. Gateways are often CGI programs, but may follow other standards such as ISAPI and Apache Modules.

glyph

An image of a character in a font.

Letters are glyphs, but in most cases, the term is used in discussions of non-alphabetic writing systems.

group

In security, a list of users or other groups that can be used to assign access permissions and capabilities.

Groups can be referenced from third-party authentication sources or can be local to Cognos 8. Local groups are managed from the administration portal. The list of groups that an authentication user is a member of is part of the user's passport for a Cognos 8 session.

In reporting, grouping is the action of organizing common values of query item together and only displaying the value once. Headers and footers often appear after each instance of a common value in a grouped column

job

A group of runnable objects, such as reports, agents, and other jobs that you run and schedule as a batch.

job step

The smallest part of a job that can be run separately. Usually, a job step is a report. A job step can also be another job.

locale

A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, and money expressions.

For Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).

metric

A measure to assess performance in a key area of a business.

model

A physical or business representation of the structure of the data from one or more data sources. A model describes data objects, structure, and grouping, as well as relationships and security.

In Cognos 8 BI, a design model is created and maintained in Framework Manager. The design model or a subset of the design model must be published to the Cognos 8 server as a package for users to create and run reports.

In Cognos Planning, a model is a group of D-Cubes, D-Lists, D-Links, and other objects stored in a library. A model may reside in one or more libraries, with a maximum of two for Contributor.

namespace

For authentication and access control, a configured instance of an authentication provider. Allows access to user and group information.

In XML, a collection of names, identified by a URI reference, which are used in XML documents as element types and attribute names.

In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.

news item

A single entry in a rich site summary (RSS) compatible format. It can include a headline, text, and a link to more information. A news item task in an agent can be used to create news items for display in a Cognos Connection portlet.

package

A subset of a model, which can be the whole model, to be made available to the Cognos 8 server.

For Metric Studio users, see metric package.

passport

Session-based information regarding authenticated users. A passport is created the first time a user accesses Cognos 8. It is retained until a session ends, either when the user logs off, or after a specified period of inactivity.

Passport information is stored in Content Manager memory. Credentials are stored encrypted.

A passport is stored in a memory-only browser cookie for the duration of the session.

portlet

A mechanism for displaying Web content as part of a portal page.

product locale

The code or setting that specifies what language, regional settings, or both to use for parts of the product interface, such as menu commands.

project

In Framework Manager, a set of models, packages, and related information for administration, and for sharing model information.

In Metric Studio, a project is a task or set of tasks undertaken by a team and monitored on a scorecard. A project tracks the dates, resources and status of the project.

In Metric Designer, a project is a group of extracts. Each extract contains the metadata that is used to populate the Metric Studio data store or to create applications.

prompt

A report element that asks for parameter values before the report is run.

publish

In Cognos 8 BI, refers to the creation of a package that makes metadata available to the Cognos 8 server. Information in the package is used to create reports and other content.

In Cognos Planning, refers to a function that is used to copy the data from Contributor or Analyst to a datastore, typically so it can be used for reporting purposes.

query

A specification for a set of data to retrieve from a data source. A report specification can contain one or more queries.

The type of object created and edited by Query Studio. A query is a subtype of report.

really simple syndication

(RSS) See rich site summary.

report

A set of data deliberately laid out to communicate business information. Depending on the context, "report" may refer to report specification or report output.

Report (more precisely, report specification) is the generic term for the objects created or edited by Query Studio, Report Studio, and Analysis Studio.

report output

Report output combines data at the point in time when the report was run with a report specification. It is a document that can be displayed, printed, or emailed. Cognos 8 can produce report outputs in HTML, PDF, Excel, or CSV formats.

report specification

The definition of queries, prompts, layouts, and styles that make up a report. A report specification is combined with data by a run operation to create report outputs. You create report specifications by using Report Studio, Query Studio, Analysis Studio, or through the Software Development Kit.

report view

A reference to another report that has its own properties, such as prompt values, schedules, and results.

You use report views to share a report specification instead of making copies of it.

rich site summary

(RSS) An industry standard format for displaying transient data, such as breaking news, in a web page or standalone viewer. Cognos Connection includes a portlet type for displaying RSS format

data. This can be used to display data from a public RSS service or to display news items generated by agents detecting events. A synonym for Really Simple Syndication.

session

The time during which an authenticated user is logged on to Cognos 8.

task

An action performed by an agent if the event status meets the task execution rules. For example, an agent can send an email, publish a news item, or run a report.

template

A reusable report layout or style that can be used to set the presentation of a query or report.

user

A person accessing a Cognos 8 application. Authenticated user definitions and information, such as passwords and IDs, are maintained in third-party authentication sources.

Other user information, such as the location of personal folders or preferred formats for viewing reports, is stored in Cognos 8.

watch list

A list of metrics that each user has chosen to monitor closely. If notification is enabled in Metric Studio, the user will receive email notification of changes to these metrics. Users can also choose to display their watch list as a portlet within Cognos Connection.

watch rule

A user-defined condition that determines whether a report is delivered to the user. When the rule is run, the output is evaluated and, if it satisfies the condition or rule, the report is delivered by email or news item. Watch rules limit report delivery to those reports containing data of significance to the user.

Web Services for Remote Portlets

(WSRP) A standard for creating presentation-oriented Web services so that they can be easily integrated within other applications, such as Web portals.

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